CAPITAL REGION POPULATION & EMPLOYMENT PROJECTIONS REPORT

Appendix 1
March 2009

GROWING FORWARD
The Capital Region's Growth Plan

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SECTION 1

INTRODUCTION

BACKGROUND TO THE PROJECTIONS

On April 15, 2008, the Capital Region Board (CRB) was established by the Province of Alberta. The Board consists of twenty-five municipalities in the Capital Region[1]. One of the priorities mandated by the CRB Regulation is the development of a Capital Region Growth Plan that includes land use, intermunicipal transit, GIS and housing.

The population and employment projections informed the Land Use, Intermunicipal Transit and Housing Plans. The Transit Committee used the population and employment projections to determine potential future transit usage in the Region within an intermunicipal Regional transit network. The Housing Committee used this information to estimate the social and affordable housing needs for the Capital Region.

STRUCTURE OF THE ANALYSIS

For the purposes of developing the Capital Region Growth Plan, the population and employment projections have been prepared at a municipal level for each of the following projection periods: 2008-2013 (5 years); 2008- 2018 (10 years), 2008- 2028 (20 years) and 2008- 2043 (35 years). The population projections have been disaggregated by 5 year age cohorts to 85 years and older. In addition, the population data has been disaggregated by occupation, or primary activity, which falls into one of eight categories: pre-schoolers; elementary/junior high school; senior high school; workers; adult (institution); adult (other) and seniors (65 years and older).

1 See page 5 for map of the Alberta Capital Region

The general process for developing the municipal population and employment projections is the development of an economic growth scenario followed by a determination of the employment and population required to meet this growth objective.

Two scenarios have been developed for this projection:

- Trend Scenario: This scenario represents the 'status-quo' and a continuation of existing patterns of growth and development in the Capital Region based on the application of historical trends and existing land use plans.
- Alternate Scenario: This scenario blends the integration of an advanced public transportation and LRT system with an approach to land use that encourages the preservation of environmentally and ecologically sensitive lands.

The population and employment control totals for the Capital Region as a whole have been kept the same for both scenarios. This allows for changes that result in the land use plan to be reflected in the change in projections for the Alternate Scenario, and not due to changes in the aggregate amount of growth in the Region.

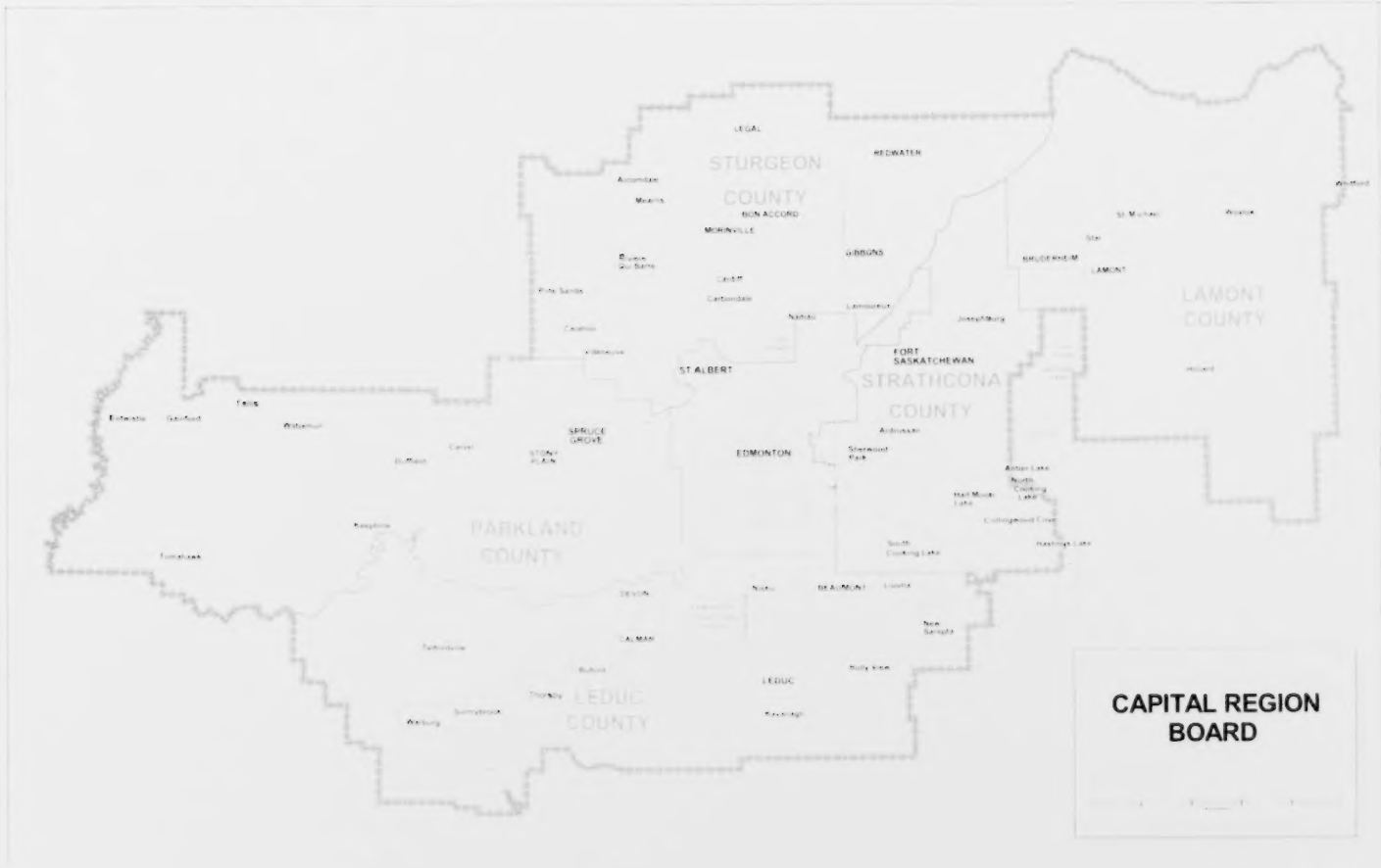
ADDITIONAL CONSIDERATIONS

The aggregate economic information contained in this Report was prepared as of October 31, 2008. Recent economic events continue to affect perceptions of both short term and increasingly medium term economic growth. It is expected that projections of economic growth for both Alberta and the Canadian economy will continue to be revised to reflect these changing world economic conditions. In a dynamic period of dramatic economic changes, it is a challenge to prepare projections that can anticipate the full range of possibilities that could significantly affect the direction and magnitude of economic growth.

It is important to recognize that the population and employment projections presented in this Report reflect an overall snapshot of the existing municipal statutory plans (Trend Scenario) and an Alternate Scenario, which is one of a number of possible scenarios that could have been developed based on the preliminary Land Use Principles and Policies established by the Land Use Committee (the Committee)[2]. The projections for this Alternate Scenario reflect one possible scenario arising from the application of the Land Use Principles and Policies. The population and employment projections for the Capital Region Growth Plan should be updated and revised once all changes to the Plan are completed. For example, the projections may need to be adjusted once priority growth areas, and agricultural lands have been identified.

This Report used the terms CMA and CMA+. CMA refers to the Edmonton Census Metropolitan Area defined by Statistics Canada. CMA+ refers to the Edmonton CMA and the Town of Lamont and all of the County of Lamont. These two communities were included in this Report because of the potential for Alberta's industrial Heartland to influence their growth. Projections have also been provided for three Indian Reserves – Alexander 135, Wabamun 133A/133B and Stony Plain 135 (Enoch) – that are included in the Edmonton CMA.

2 The CRB adopted the final Land Use Principles and Policies, as recommended by the Committee, on March 5, 2009


LEGAL
STURGEON COUNTY
REDWATER
MORINVILLE
GIBBONS
BRUDERHEIM
LAMONT
LAMONT COUNTY
FORT SASKATCHEWAN
ST. ALBERT
STRATHCONA COUNTY
SPRUCE GROVE
EDMONTON
PARKLAND COUNTY
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LEDUC COUNTY
CAPITAL REGION BOARD

CAPITAL REGION
BOARD

SECTION 2

DEVELOPMENT OF REGIONAL POPULATION & EMPLOYMENT PROJECTIONS

CONTEXT FOR GROWTH IN THE CAPITAL REGION

Population and employment growth in the Capital Region will be driven by general economic growth. For the purposes of the Capital Region Growth Plan, it has been determined that an optimistic, or high growth scenario, would be most appropriate. This will ensure that sufficient consideration is given to the land requirements to accommodate growth and development over the forecast period, having the benefit of not underestimating the impact of growth and having to "catch up" at a later date. If actual growth is less than projected, the timeframe for the Plan's projections may be extended beyond the forecast period.

Economic Growth

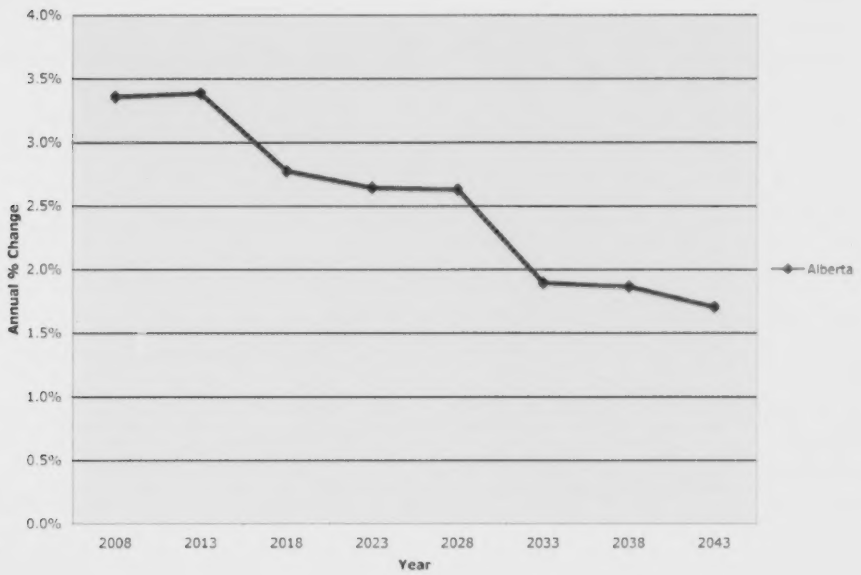
The potential for an optimistic growth scenario has been evaluated in the context of Provincial and Canadian growth. This section of the Report reviews some of the major underlying assumptions that have been incorporated in the aggregate Capital Region growth projections.

National and Provincial Economic Growth

The Conference Board of Canada produces the only public, long term growth projection[3] at a Provincial level (to 2030) which is summarized in the following graphic.

3 Provincial Outlook 2008, Conference Board of Canada. Long Term Economic Forecast to 2030. After 2030 the Conference Board forecast has been extrapolated to 2043

Average Annual Change in Real Gross Domestic Product (GDP)



This forecast shows that the Provincial economy is expected to grow at a rate of approximately 3.4 percent per year between 2008 and 2013. After this period, Provincial growth is projected to moderate to about 2.6 percent to 2.8 percent. The last few years of the Conference Board forecasts are extrapolated to the end of the timeframe used for these forecasts and it is expected Provincial growth will decline to 1.7 percent to 1.9 percent over the remainder of the forecast period.

It should be noted that these forecasts were prepared prior to the current financial crisis in the United States and elsewhere in the world. As a result, it is expected that the Conference Board will be revising their growth forecast downward. The first step in this process is reflected in their Metropolitan Outlook[4], which shows a different GDP growth pattern for Alberta than the Long Range Forecast. It is expected that this forecast will be further revised downward in the next iteration.

The housing crisis in the U.S. and bailout of financial institutions all over the world has affected global economic growth adversely. The worsening U.S. housing market slowed down Canadian exports of lumber and other construction material. Canadian exports of manufactured goods, especially automobiles, have also decreased due to reduced consumer spending in the U.S. Despite the weak global economic environment, the near-term economic growth forecasts for Canada are better than for most other industrialized countries. After a short term interruption in economic growth, private investments in oil sands, high commodity prices and low inflation are some factors that will lift the forecast for the Canadian economy in the mid and long term.

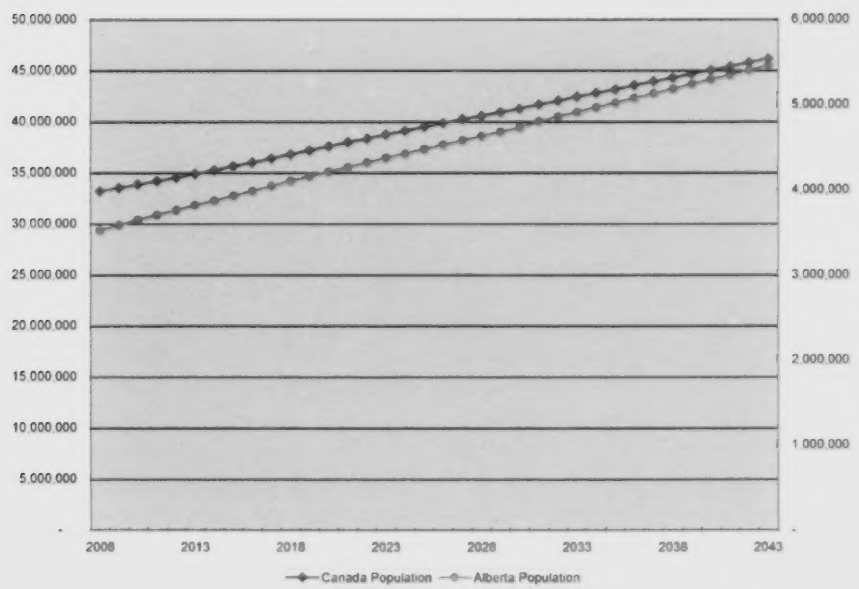
4 Metropolitan Outlook, Conference board of Canada, Autumn 2008

National Population Growth and Aging

One of the most important factors affecting Canada's economic performance will be the aging population of Canada. The baby boomer generation, people who were born between 1947 and 1966, will be entering the 65 years plus age cohort. The Conference Board of Canada expects that by 2030, approximately a quarter of Canada's population will be aged 65 or over. The growth of population comes from two sources: natural increase in population, and immigration. Due to low fertility rates and an aging population, the share of natural increase in population growth will decrease over the forecast period. As a result of a significant decline in natural increase, immigration will play a bigger role in overall population growth. High living standards and the prospect of good jobs and careers, when combined with federal government policies favoring skilled immigrants, will attract more people to migrate to Canada. High immigration levels will partly offset the low natural increase rates. The Conference Board of Canada estimates that Canada's population will rise from 32.8 million in 2007 to 41.2 million in 2030, shifting through an older age structure.

As Alberta is expected to continue to be one of the nation's best economic performers, it will attract a relatively high proportion of migrants. The same two factors affecting natural increase at a national level, low fertility rate and an aging population, will also show their effect on Alberta's demographic structure. However, relatively strong economic conditions, a positive job market and the Province's relatively low rates of taxation will help attract inter-Provincial migrants and international immigrants to Alberta. The Conference Board of Canada estimates that the population growth in Alberta will average 1.9 per cent from 1991 to 2012, slowing to 1.3 per cent over the rest of the forecast period. The population forecasts for both Canada and Alberta are depicted in the following graph.

Canada & Alberta Population Growth[5]



5 Metropolitan Outlook, Conference board of Canada, Autumn 2008

The change of demographic structure of both Canada and Alberta will impact the labour market. As the baby boomers start to retire, the labour force will decrease significantly. The labour force participation rate and total net immigration to Canada will also play crucial roles in determining the supply of labour in both Canada and Alberta over the forecast period.

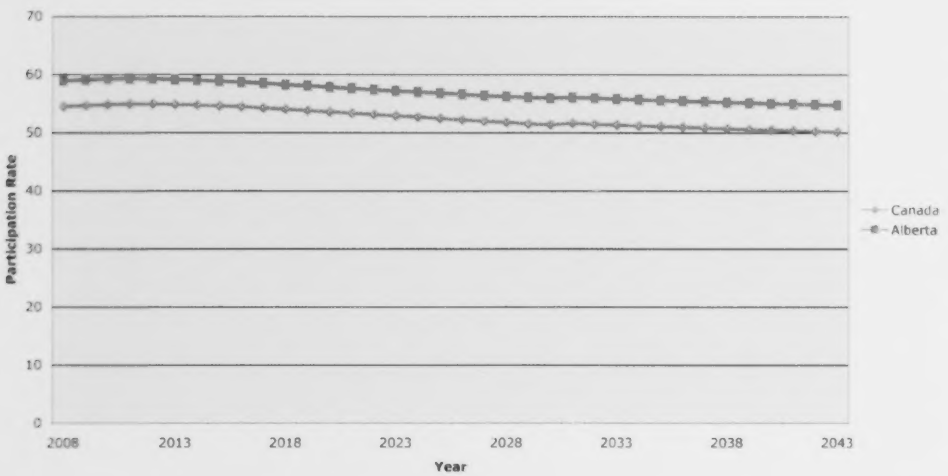
Labour Force Participation Rates

Labor force participation rate is defined as the percentage of employed and unemployed people in the population aged 15 years and older. Although relatively stable over time, the labour force participation rate can be influenced by the demographic structure of the population and economic cycles.

High immigration rates to Canada and increasing number of women in the workforce are likely to increase the participation rates in both Canada and Alberta. However, as aging baby boomers retire, there will be downward pressure on the labour force participation rate over the long-term. This is seen in the Conference Board labour force projection (and extrapolation of this forecast) in the figure below.

In aggregate, the Alberta labour force participation rate is projected to be higher than the national average, due in large part to the expectation that economic prospects in Alberta will be better than average. This will attract younger adults and workers to the Province, which will, in turn, keep the proportion of adults aged 65 years and older at a lower level than the average for Canada.

Participation Rate for Canada and Alberta[6]

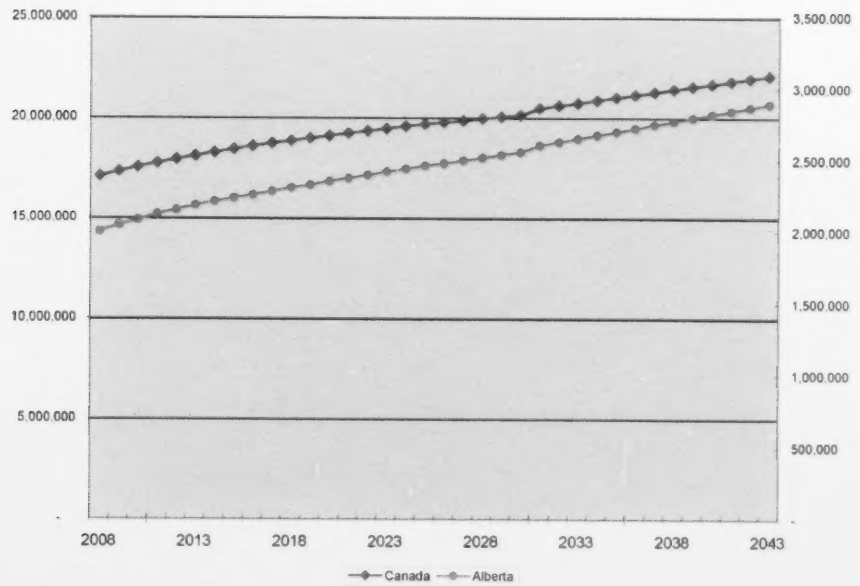


6 2008-2030 Conference Board Forecast. 2031-2043 is a trend of the Conference Board Forecast.

Total Employment

In the medium and long term, employment growth will be driven by economic growth and influenced by the participation rate and the natural rate of unemployment as mentioned above. High migration levels combined with a decreasing rate of natural unemployment will cause the employment to grow over the forecast period. The employment levels for Canada and Alberta are depicted in the figure below.

Employment[7]



Unemployment Rates

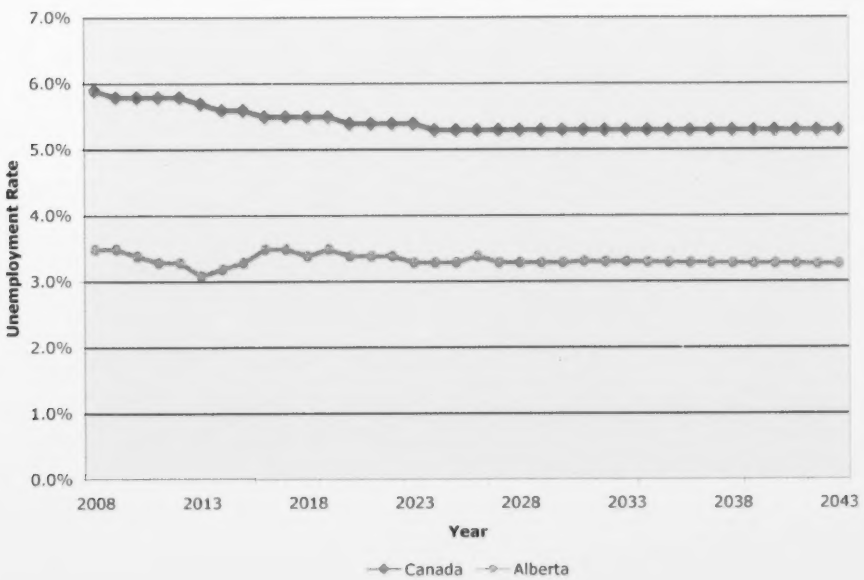
The natural rate of unemployment is defined as the rate of unemployment when the labor market is in full equilibrium. The unemployment rate in a Region indicates the extent to which labour is available to facilitate economic growth. In recent history, Alberta has been operating at "full employment", which is defined as an unemployment rate of 3.5 to 5 percent.

The Conference Board of Canada estimates that the unemployment rate in Canada will decline to 5.3 percent by 2030 from its current level of 5.9 percent[8]. Also, as the overall age of the labour force increases, labour force participants will be less likely to quit their jobs in search of other jobs, resulting in less frictional employment.

7 2008-2030 Conference Board Forecast. 2031-2043 is a trend of the Conference Board Forecast
8 Canadian Outlook 2008, Conference Board of Canada, Long Term Economic Forecast, P49

For Alberta, it is expected that the unemployment rate will decline to 3.3 percent by 2030 from its current level of 3.5 percent, and remain at this level for the rest of the forecast period. The following figure depicts the unemployment rate, which has been extrapolated to the end of the forecast period for Canada and Alberta. In this forecast, it is expected that the Alberta economy will continue to operate at "full employment" over the forecast period.

Unemployment Rates[9]

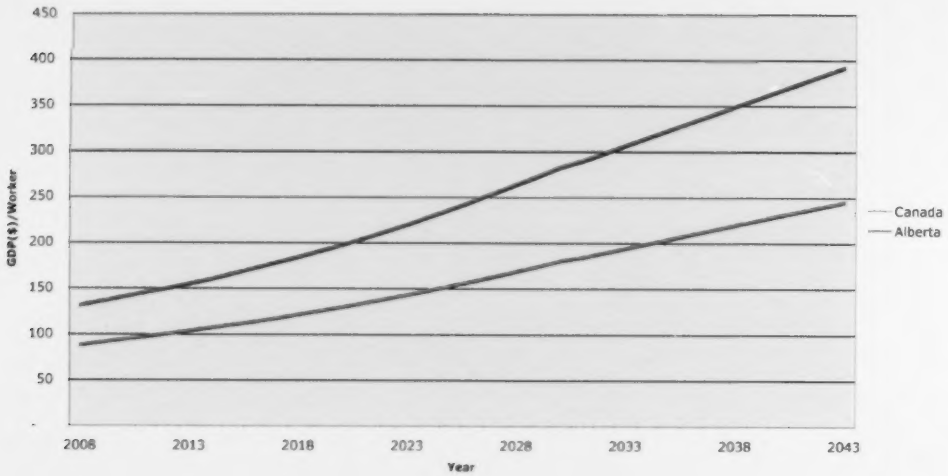


Labour Productivity

Labour productivity measures the amount of total output (GDP) for each worker in the labour force. Over time, labour productivity has increased at a faster rate in Alberta than Canada as a whole. This trend is projected to continue over the forecast period in this high growth scenario.

9 2008-2030 Conference Board Forecast. 2031-2043 is a trend of the Conference Board Forecast.

GDP/Worker for Canada and Alberta[10]



Other Economic Indicators

This projection includes assumptions across a number of important fiscal and monetary variables, including:

- The prime rate is expected to generally increase from 6.11 percent in 2007 to 6.75 percent by the end of the forecast period.
- The value of the Canadian dollar is projected to generally fall against the U.S. dollar from its 2007 average of $0.94 to $0.90 by the end of the forecast period.
- Oil prices[11] are projected to fall in the short term to approximately $70 (US$) per barrel and then recover to over $100 (US$) per barrel by the end of the forecast period.
- Inflation[12] is projected to moderate over the forecast period from 2.4 percent in 2007 to 2.0 percent by the end of the forecast period.

Capital Region Economic Growth

As noted in the Introductions of this Report, recent economic events continue to affect perceptions of short term economic growth. It is expected that forecasts of Alberta and Canadian economic growth will be revised downward to reflect deteriorating world economic conditions. At the time of preparing these aggregate economic forecasts (October 2008), emerging information of the housing market decline and credit crisis in the United States (and elsewhere in the world) was beginning to affect expectations of short term economic growth in Canada. Since that time, the economic news has worsened as some analysts project a more significant economic downturn for Canada and Alberta.

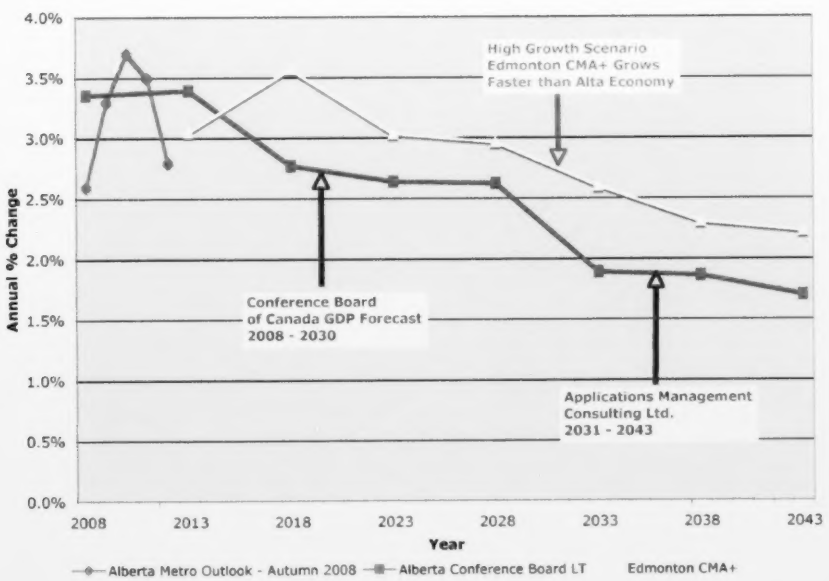
10 2008-2030 Conference Board Forecast. 2031-2043 is a trend of the Conference Board Forecast
11 West Texas Intermediate
12 Inflation as measured by the Consumer Price Index

As a result of this economic news, the Conference Board updated its forecast for Alberta and revised it downward. This adjustment is reflected in the figure below.

To reflect the potential for economic growth in the Capital Region, an optimistic scenario, it has been assumed that growth will be roughly one half of one percentage point higher than the Provincial average. When the Alberta economy is growing, the Capital Region can maintain an average annual rate of growth that exceeds the national economy by about a half of one percentage point. This has been utilized in estimating a local Capital Region economic growth rate.

The additional growth for the Capital Region in this scenario assumes a continuation of the relatively high rate of investment in oil sands projects in the Province over the medium and longer term, and the Capital Region being a major beneficiary of spin-off and indirect growth associated with this investment. A comparison of the economic growth projected for Alberta and that for an optimistic growth projection for the Capital Region are depicted in the following graphic.

Average Annual Change in Real GDP[13]

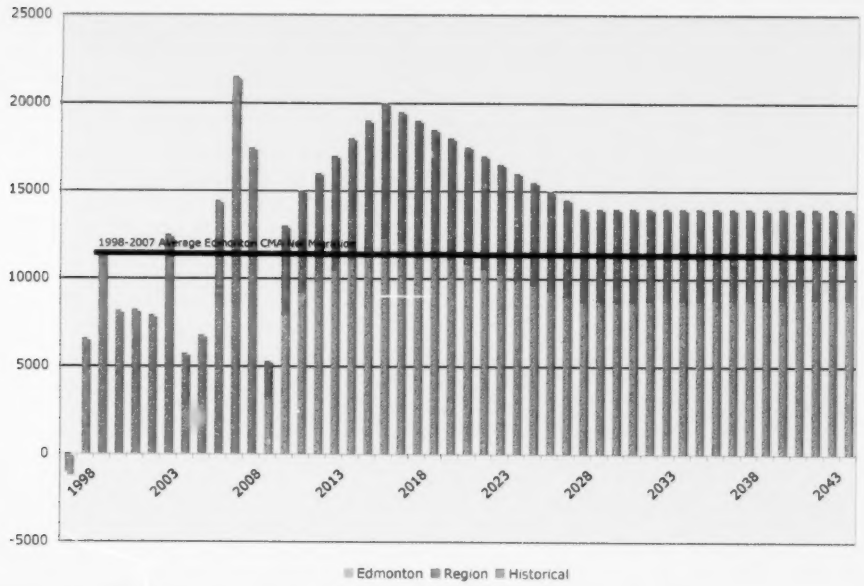


Migration

The projected growth for the Capital Region will require a significant increase in population to provide the number of workers necessary to support all the activity included in the projections. It has been estimated that the net migration required to meet this economic growth scenario will consistently be above the average level achieved for the Edmonton CMA over the past ten years. The chart below displays the average migration for the Edmonton CMA which is about 11,000.

13 Real GDP at basic prices (constant 1997 $)

Net Migration - Edmonton CMA[14]



POPULATION PROJECTION MODEL FRAMEWORK

In developing the population projections for the Capital Region, a cohort survival model including migration has been utilized. This model is disaggregated at the municipal level and incorporates assumptions about the existing age breakdown of the population in each municipality in the Region, as well as Regional estimates for fertility and mortality. The analytical framework utilized in projecting population growth in this analysis is summarized below.

Base Year Population Data

The base year for the projection is 2008. Where available, 2008 Municipal Census information has been used as the basis of the projections. Where this data is not available, we have relied on the 2007 Municipal Census (where available) and the 2006 Federal Census. In these cases, the 2006 and/or 2007 data has been used as a starting point to estimate the 2008 population. Where 2008 census data was not available, other information available from the municipality, including housing starts, building permits or other indicators of growth have been used to arrive at a 2008 population estimate.

The following table outlines the source of the most recent data and municipalities for which an estimate was required for 2008.

14 Includes the Edmonton CMA plus the Town of Lamont and all of Lamont County

Base Year Population (2008)

Municipality	2006	2007	2008	
Alexander 134	962		976	
Bon Accord	1,535		1,603	
Gibbons	2,642	2,848	2,906	
Legal	1,193		1,252	
Morinville	6,775		7,228	
Redwater	2,192		2,302	
St. Albert	57,787		58,501	
Sturgeon County	18,664		19,204	*
Bruderheim	1,215		1,385	
Fort Saskatchewan	15,089	16,146	17,243	*
Lamont County	3,935		3,937	
Town of Lamont	1,675		1,689	
Strathcona	82,705		84,415	
Beaumont	8,961	9,749	10,820	
Calmar	1,959		2,004	
Devon	6,256		6,400	
City of Leduc	17,021		20,529	
Leduc County	12,734		12,985	
New Sarepta	410		417	
Thorsby	945		964	
Warburg	621		632	
Stony Plain 135 (Enoch)	1,491		1,521	
Parkland County	29,740		29,850	
Spruce Grove	19,496		22,380	
Stony Plain	12,518		14,310	
Wabamun	601		610	
Wabamun 133A/133B	1,185		1,300	
City of Edmonton	740,041		766,742	*
Region Total	**310,307**		**327,363**	
Capital Region Total	1,050,348		1,094,105	

2007 Municipal Census
2008 Municipal Census
2008 Applications Estimate

* Includes special populations not included in the municipal census (Group Count, Hotel Population and PSE)

Municipal Census data was available for eight municipalities in the Capital Region. These municipalities represent most of the large municipalities in the Region. As a result, the total 2008 population from Municipal Census data is estimated to represent 90 percent of the total population of the Capital Region.

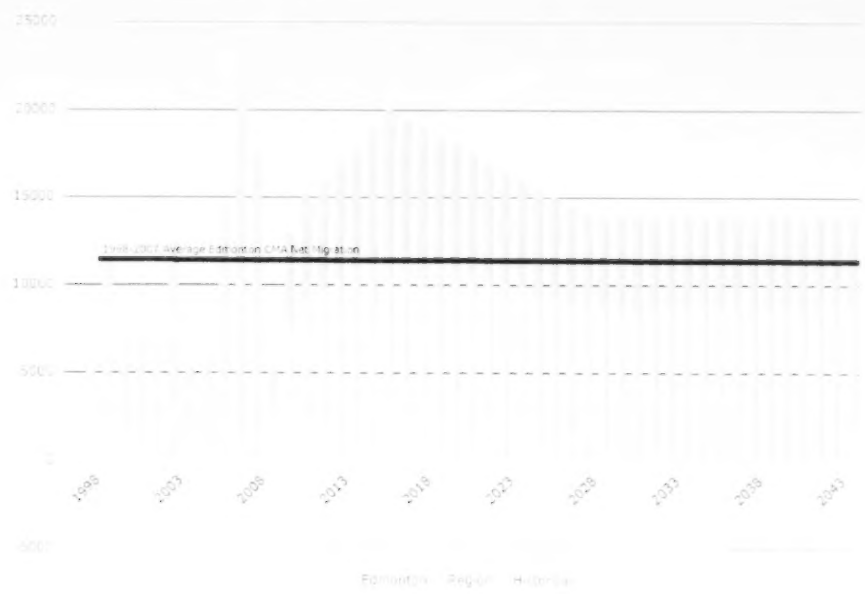
Based on this analysis, the total population of the Capital Region is estimated to be 1,094,105. This reflects an increase of 43,757 from 2006 and an average annual growth rate of 2.06 percent.

Age Cohort Adjustments

The data for all municipalities had to either be aggregated or disaggregated to conform to the age cohort specifications of the model. Generally, this adjustment utilized the 2006 Federal Census age breakdown as a proxy to distribute the total population into the model age cohorts where they differed from those used by the model.

Cohort Survival Analysis

The cohort survival component of the model incorporates constant values for fertility and mortality rates over the projection period. The number of births and deaths are calculated in each year of the projection and advances the age of the population in each of the age cohorts. Surviving members in each age cohort or age group proceed into successive age groups in each year of the projection. Net migration has been added to each municipal age cohort to meet the expected population targets set for that municipality.



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Fort Saskatchewan	15,089	16,148	17,243	*
Lamont County	3,915		3,937	
Town of Lamont	1,675		1,689	
St. Albert 2A	82,705		84,415	
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Leduc County	12,714		12,985	
New Sarepta	410		417	
Thorsby	948		964	
Warburg	611		632	
Stony Plain 128 (Enoch)	1,491		1,521	
Parkland County	29,745		29,650	
Spruce Grove	19,466		22,380	
Stony Plain	12,518		14,310	
Wabamun	604		610	
Wabamun 133A/133B	1,193		1,300	
City of Edmonton	740,041		766,742	*
Region Total	310,307		327,363	
Capital Region Total	1,050,348		1,094,105	

2007 Municipal Census
2008 Municipal Census
2008 Additional Estimate

* Includes special population not included in the Municipal Census (Grande Cache, Intermunicipal and RSE)

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Fertility Rates

Single year birth rates were provided by the City of Edmonton, based on 2001-2003 Edmonton CMA data available from Statistics Canada. The single year birth rates were aggregated into five-year birth rates to adapt to the five-year age categories used in the model. The birth rates for each five-year age category were then applied to the female population in that age category to calculate the total number of births for that period. Constant birth rates were applied throughout the projection period. The following table shows the 2008 birth rate per 10,000 female by age cohort used in the model.

Births per 10,000 By Age of the Mother

Age of Mother	2008
0-4 yrs	-
5-9 yrs	-
10-14 yrs	0
15-19 yrs	67
20-24 yrs	251
25-29 yrs	460
30-34 yrs	462
35-39 yrs	204
40-44 yrs	34
45-49 yrs	1
50-54 yrs	-
55-59 yrs	-
60-64 yrs	-
65-69 yrs	-
70-74 yrs	-
75-79 yrs	-
80-84 yrs	-
85+ yrs	-

Mortality Rates

Mortality rates were provided by the City of Edmonton, based on 2005-2007 Edmonton CMA data available from Statistics Canada. The single year mortality rates were aggregated into five-year mortality rates to adapt to the five-year age categories used in the model. The mortality rates for each five-year age category were applied to the total population in an age category to determine the total number of deaths for that period. Constant mortality rates were applied throughout the projection period. The following table shows the 2008 mortality rate per 10,000 people by age cohort used in the model.

Deaths per 10,000 By Age Cohort

Age Group	2008
0-4 yrs	3
5-9 yrs	2
10-14 yrs	1
15-19 yrs	6
20-24 yrs	7
25-29 yrs	8
30-34 yrs	8
35-39 yrs	11
40-44 yrs	16
45-49 yrs	27
50-54 yrs	35
55-59 yrs	59
60-64 yrs	89
65-69 yrs	144
70-74 yrs	234
75-79 yrs	364
80-84 yrs	605
85+ yrs	1,206

Migration

Population growth is primarily due to net migration. Net migration to the Region includes both workers and their families who choose the Edmonton CMA as their home. For the purpose of this projection, the model has been seeded with an age cohort profile reflecting the age breakdown of net migrants to the Edmonton CMA in 2007[15]. This profile has been applied to the total number of net-migrants choosing the Edmonton CMA as their home.

The following table shows the age distribution of 1,000 net migrants (workers with additional household members) moving into the Capital Region.

Net Migrant Profile Associated with 1,000 Net Migrants

Age Group	Total Migrants
0-4 yrs	71
5-9 yrs	65
10-14 yrs	53
15-19 yrs	105
20-24 yrs	225
25-29 yrs	142
30-34 yrs	105
35-39 yrs	94
40-44 yrs	54
45-49 yrs	28
50-54 yrs	20
55-59 yrs	14
60-64 yrs	10
65-69 yrs	(1)
70-74 yrs	4
75-79 yrs	3
80-84 yrs	4
85+ yrs	3

It should be noted that the 60-64 age cohort has a negative net migration number. This means that people in this age cohort are moving out of the Capital Region on a net basis.

The net migrants are added into the cohort survival component of the model that calculates births and advances the age of the population in each of the projection years. Surviving members in each age cohort or age group proceed into successive age groups as the years advance in the projection.

15 As provided by the City of Edmonton

EMPLOYMENT MODEL FRAMEWORK

Employment control totals are developed based on the estimated number of workers required to achieve the projected economic growth in the Region. This is consistent with the number of workers who will be available from the Region based on the population projections and number of workers aged 15 to 64 years and working seniors (65 years and older). The distribution of employment across municipalities in the Region is based on analysis of the following factors.

Base Year Employment Data

Employment data in the model is based on a geographic distribution of the employment data from the 2001 Federal Census. This data has been projected for each municipality based on the population growth[16] and non-residential development in the municipality, and calibrated against total employment estimates for the Capital Region from the 2006 Federal Census and the monthly Labour Force Survey data between 2006 and 2008[17].

Employment Allocation Framework

The employment projections are based on various methods which depend on the nature of the employment considered and what types of development are allowed in each geography included in the analysis. The employment allocation has been modified for the purposes of this projection as detailed breakdowns by industry and geographies were not needed. While the results of the analysis will not provide specific industry projections in detail, they were considered in the projections for each scenario. As well, the detailed geographic breakdown typically considered in these projections has not been considered in detail, but rather in a more general sense[18].

Employment Growth Related to Residential Development

In each community, there are a number of jobs associated with residential development. These are primarily jobs in Commercial Services[19] and Non-Commercial Services[20] and Retail[21]. Each community has unique levels of population-related commercial activity available in the community based on it's size and geographic location and proximity to major trading areas within the Region. These factors are used to allocate growth to communities that is associated with residential growth.

16 2007 and 2008 Municipal Census data.

17 The 2006 employment data is expected to be available soon with a geographic distribution that will allow for an update of the Base Year employment data.

18 Typically the geographic breakdown is by Traffic Zone (or neighbourhood) of which there are approximately 1,200 in the Capital Region.

19 It should be noted that where there are inconsistencies between the implied labour force and employment totals for the Capital Region from Municipal Census data and the Labour Force Survey, the data generated from the updated Municipal Censuses has been relied upon in determining the 2008 employment totals.

20 Non-Commercial Services includes employment primarily in the areas of education and health care.

21 It is estimated that on average, these three industries represent approximately 80 percent of residential related employment.

Non-Residential Related Employment

There are several major employment centres in the Region that will experience significant employment growth over the projection period. Each of these Regions is discussed in more detail in the following sections describing the scenarios.

Construction Employment

There is a significant employment complement that works "on-site", or at the location of construction activity. In modeling construction employment, the residential and non-residential growth in each municipality has been used as the basis for allocating a portion of the employment associated with the construction industry.

Post-Secondary Employment

As part of the population projection, adults aged 15 to 64 years are allocated to occupations or primary activities including Post-Secondary Enrollment. The employment at the major Post- Secondary institutions in the Region has been adjusted to be consistent with the growth in Post-Secondary enrollments.

Major Institution Employment

Institutionalized populations[22] are projected to grow at a rate similar to that for the total population. The employment at these institutions has been increased to be consistent with the institution population growth.

Employment Capacity

To assist with the employment allocation process, build out employment capacities have been estimated for each Traffic Zone in the model. Because this level of geographic detail was not required for this study, the capacity information was deal with in a generalized way across various employment growth centres within municipalities.

22 This includes populations at hospital and jails

SECTION 3

TREND SCENARIO

The purpose of this section of the Report is to provide background on the key assumptions used in developing the municipal projections of population and employment in the Trend Scenario.

OVERVIEW OF THE TREND SCENARIO

The Trend Scenario projects the development of the Capital Region from 2008 out to 2043 with minimal change in current land use development patterns. Low density residential use continues to expand into greenfield sites as a dominant form of land use development. Mobility needs are expected to remain mainly tied to the automobile, with an ongoing need to continue expanding road and highway networks. Development of an intermunicipal transit network is not a high priority. While there is some intensification and redevelopment of existing build-out areas in the City of Edmonton, development across the Capital Region generally continues "out", not "up".

DEFINITION OF THE TREND SCENARIO

The Trend Scenario represents a continuation of the status-quo. Existing land use plans and patterns of growth and development have been assumed to continue in the Capital Region over the next thirty-five years. Specifically this includes:

- All approved Municipal Development Plans (MDPs), Area Structure Plans (ASPs) and Neighbourhood Structure Plans (NSPs), as well as concept plans (where available) have been used as the basis for determining where development can occur. The specific planning documents available for this analysis are provided in Section 5 of this Report.
- The historic pattern of residential development has been assumed to continue. This includes a continued reliance on suburban residential growth in the City of Edmonton and similar patterns of residential growth in urban municipalities elsewhere in the Region. As well, a continued development of country residential development has been included in this distribution. Implicit in this assumption is that the cost of servicing continued suburban development will continue to be affordable.

- The market for residential development is assumed to continue largely as it has over the past twenty years. This involves a variety of residential choice in the Region across a variety of municipalities. Historic growth patterns and availability of residential housing consistent with municipal statutory plans has been used to simulate market trends over the projection period.

- The historic pattern of employment growth in the Region will continue over the projection period. This will involve the concentration of industrial and business commercial activity in existing designated areas in the Region. As well, the historic pattern of commercial and business services associated with population growth will continue in a manner consistent with the context of each community in the Region.

- In addition to the historic centres of employment growth, the Industrial Heartland, Port Alberta initiative and the Edmonton International Airport will be major drivers of economic growth in the Region.

- Major transportation routes enhance mobility and facilitate suburban and scattered development. It is assumed in the Trend Scenario that the Anthony Henday will be completed by 2015 and the outer ring road will be completed by the end of the projection period. Other improvements to the major arterial roadway system within Edmonton and the highway system outside of Edmonton are assumed to meet the needs of the growth scenario.

- Development of LRT within the City of Edmonton is assumed to be limited to the completion of a southwest line south of Anthony Henday Drive to the existing south boundary of Edmonton and the creation of a new line to the northwest to NAIT.

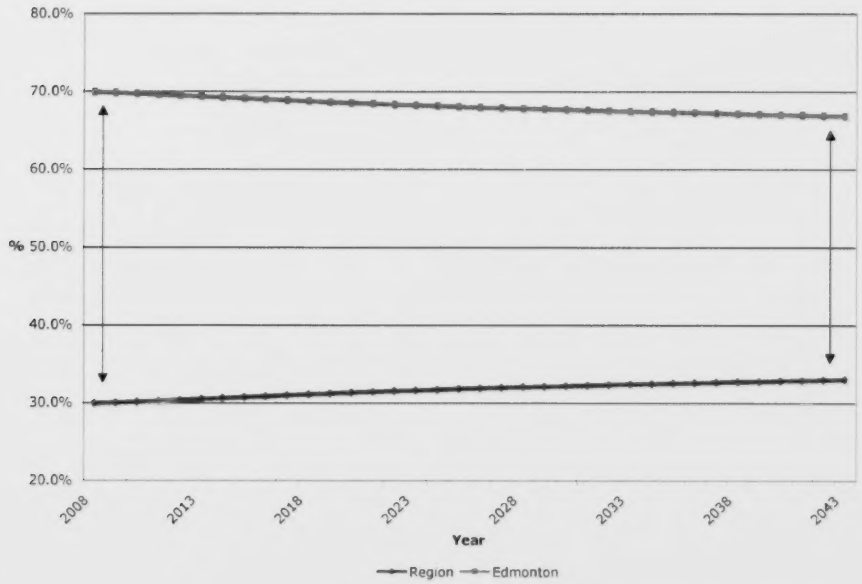
- Municipal projections (where available) were reviewed and the projection of the growth in each municipality within the context of the Capital Region was determined.

EDMONTON REGIONAL SHARES

Historically, the area outside the City of Edmonton has grown at a faster rate than Edmonton. It is expected that this trend will continue over the projection period. However, the difference in the rate of growth in Edmonton and the rest of the Region as a whole is expected to diminish. As a result, the share of population growth allocated to the City of Edmonton and the rest of the Capital Region will be more similar at the end of the projection period.

Of the total Capital Region population the City of Edmonton currently has approximately 70 percent of the total, whereas the rest of the Region has about 30 percent of the total. The chart below shows that over the projection period the total population share slightly shifts between the city and the rest of the Region, with the City of Edmonton maintaining a 70 percent share in the short term and moving towards 67 percent of the total population in the long term, and the rest of the Region moving from 30 percent to 33 percent of the total population share.

Total Capital Region Population Share



In allocating population growth between the City of Edmonton and the rest of the Region, it is assumed that the Region will continue to grow more quickly, but at a rate that is closer to the growth rate of Edmonton than has been the case in the past thirty years. In the population control totals, it has been assumed that over the next thirty-five years out to 2043, the area outside Edmonton would experience higher growth at a rate of 1.6 percent and Edmonton at a rate of 1.2 percent. As a result, the rest of the Region will continue to capture a greater share of the Edmonton CMA population, increasing from 30 percent in 2008 to 33 percent by 2043.

REGIONAL MUNICIPAL PROJECTIONS

The rationale for the population and employment projections for each municipality in the Capital Region is summarized in Section 5 (Municipal Summaries) of this Report. As background to these projections, some overarching issues have been identified and are discussed below.

Projection of Regional Population to Municipalities

Existing municipal statutory plans (e.g. Municipal Development Plans, Area Structure Plans etc.) have been used as the basis for determining the type of development that can be expected in each municipality in the Trend Scenario[23]. In addition to the nature of development these plans support, there are a number of other issues related to the amount and location of growth. The specific influences for each municipality are provided in Section 5, however, there are three general analytical issues that are relevant to these projections: build out capacities; historical trends; and, the impact of new economic growth centres in the Region.

Build Out Capacities

In the Trend Scenario, existing municipal statutory plans form the basis of the types of development that will be allowed and the build out density of development. Of importance in projecting growth is knowing when an area is fully developed. Determining build out capacities is straightforward in cases where the existing land use plans provide this detail. In other instances, municipal plans infer some information about development density. Where interpretation has been required, it is based on the pattern and density of development in built-up areas (where they exist). It should be noted that these capacities are used as guidelines for the projection and that the actual projection is allowed to exceed or be below the estimated build out capacity of an area by some range of tolerance.

Historical Trendline Analysis

Historical patterns of growth at the municipal level help provide insight into the relative desirability and market position of each community in providing residential location alternatives in the Region. Because the broad economic conditions existing in the Region are a significant contributor to growth, looking at these historical trends over different time periods is instructive when considering future growth patterns.

In each of the municipal projection charts for population growth, four historical trend lines are provided, each incrementally providing more historical data:

- 10 year trendline - which covers the 10 years prior to 2008.
- 15 year trendline - which covers the 15 years prior to 2008.
- 20 year trendline - which covers the 20 years prior to 2008.
- 25 year trendline - which covers the 25 years prior to 2008.

The trendline projection is a continuation of the historic trend (for the given period) into the future. Where historic growth rates have been highest in the past ten years, the ten year trendline will project the highest rate of population growth for a given municipality.

It should be noted that the trendline analysis provides information for the projections and that future growth is not expected to be equal to historic growth.

23 This includes the urban development at the new urban development at the proposed urban services node in Strathcona County northeast of Sherwood Park.

Impact of Major Employment Growth Centres

In addition to a continuation of the existing pattern of population and non-residential development in the Capital Region, there are two major economic development initiatives that are expected to be significant and have a substantive impact on development: the Industrial Heartland; Port Alberta; and, the expansion of Edmonton International Airport. The potential for development in these areas and what has been assumed in this analysis are discussed elsewhere in this Report.

In addition to the employment potential of these developments, they will have an impact on the pattern of residential development in the Region. An increase in the desirability of communities as a residential location that are in relative proximity to the Industrial Heartland, Port Alberta and Edmonton International Airport (as with other major employment growth areas in the Region), has been considered in the population projections. Where appropriate, the impact of these developments on the population projections has been provided in the Municipal Summaries section of this Report.

TREND SCENARIO POPULATION PROJECTIONS

The results of the Trend Scenario population projections are provided in the tables below.

- Over the next 35 years, the population of the Capital Region is projected to grow to over 1.7 million people.
    - This growth of almost 615,000 in the Capital Region represents an average annual growth rate of 1.3 percent.
- The population of Edmonton is projected to grow from approximately 767,000 in 2008 to 1.145 million in 2043.
    - This growth of just over 378,000 in Edmonton represents an average annual growth rate of 1.2 percent over the projection period.
- The rest of the Capital Region is projected to grow from approximately 327,000 people to 563,500 by 2043.
    - This growth of just over 236,000 in the rest of the Region represents an average annual growth rate of 1.6 percent over the projection period.

Trend Scenario Population Projection by Municipality

Municipality	Quadrant	2008	2013	2018	2028	2043
Alexander 134	North	976	1,033	1,126	1,257	1,405
Bon Accord	North	1,603	1,781	2,039	2,452	2,950
Gibbons	North	2,906	3,229	3,696	4,445	5,348
Legal	North	1,252	1,357	1,516	1,735	1,938
Morinville	North	7,228	8,030	9,192	11,055	13,301
Redwater	North	2,302	2,557	2,927	3,520	4,235
St. Albert	North	58,501	64,996	72,606	85,191	99,998
Sturgeon County	North	19,204	20,310	22,135	24,719	27,608
Bruderheim	East	1,385	1,585	1,867	2,313	2,783
Fort Saskatchewan	East	17,243	19,662	23,091	29,326	38,413
Lamont County	East	3,937	4,062	4,320	4,592	4,761
Strathcona County	East	84,415	93,787	104,769	125,997	147,891
Town of Lamont	East	1,689	1,743	1,853	1,970	2,094
Beaumont	South	10,820	12,021	13,761	17,043	21,752
Calmar	South	2,004	2,227	2,549	3,065	3,688
Devon	South	6,400	7,110	8,139	9,788	11,777
Leduc City	South	20,529	22,255	24,861	28,463	31,795
Leduc County	South	12,985	14,077	15,725	18,003	20,110
New Sarepta	South	417	441	481	537	600
Thorsby	South	964	1,045	1,167	1,336	1,493
Warburg	South	632	669	729	794	887
Stony Plain 135 (Enoch)	West	1,521	1,649	1,842	2,109	2,355
Parkland County	West	29,850	32,361	36,150	41,387	46,231
Spruce Grove	West	22,380	24,865	27,776	33,404	40,191
Stony Plain	West	14,310	15,899	18,199	21,887	27,125
Wabamun	West	610	629	669	712	756
Wabamun 133A/133B	West	1,300	1,409	1,574	1,802	2,013
Region Total		**327,363**	**360,788**	**404,760**	**478,902**	**563,500**
Edmonton Total		766,742	827,512	900,833	1,019,420	1,145,279
Capital Region Total		**1,094,105**	**1,188,300**	**1,305,593**	**1,498,322**	**1,708,779**

Population Projection - Average Annual Change (From Previous Period)

Municipality	Quadrant	2013	2018	2028	2043	Annual Avg Change 2008 2043
Alexander 134	North	1.1%	1.7%	1.1%	0.7%	1.0%
Bon Accord	North	2.1%	2.7%	1.9%	1.2%	1.8%
Gibbons	North	5.1%	3.6%	2.9%	1.4%	2.7%
Legal	North	1.6%	2.2%	1.4%	0.7%	1.3%
Morinville	North	1.4%	0.7%	0.7%	0.9%	0.9%
Redwater	North	5.8%	5.1%	2.5%	1.5%	2.9%
St. Albert	North	2.1%	2.2%	1.6%	1.1%	1.5%
Sturgeon County	North	0.6%	1.3%	0.9%	0.7%	0.8%
Bruderheim	East	2.7%	3.3%	2.2%	1.2%	2.0%
Fort Saskatchewan	East	4.2%	3.9%	2.8%	1.4%	2.6%
Lamont County	East	0.1%	1.0%	0.7%	0.2%	0.5%
Strathcona County	East	1.2%	1.9%	1.2%	0.5%	1.0%
Town of Lamont	East	0.6%	1.2%	0.6%	0.4%	0.6%
Beaumont	South	2.0%	1.8%	1.5%	1.1%	1.4%
Calmar	South	1.7%	1.5%	0.9%	0.6%	0.9%
Devon	South	2.1%	1.4%	1.1%	0.9%	1.2%
Leduc City	South	3.0%	4.9%	2.3%	1.0%	2.2%
Leduc County	South	4.0%	6.0%	2.7%	1.2%	2.7%
New Sarepta	South	1.1%	1.7%	1.1%	0.7%	1.0%
Thorsby	South	1.6%	2.2%	1.4%	0.7%	1.3%
Warburg	South	1.1%	1.7%	0.9%	0.7%	1.0%
Stony Plain 135 (Enoch)	West	1.6%	2.2%	1.4%	0.7%	1.3%
Parkland County	West	0.7%	0.2%	0.2%	0.1%	0.2%
Spruce Grove	West	1.9%	1.7%	1.4%	1.1%	1.4%
Stony Plain	West	1.5%	2.2%	1.5%	1.3%	1.5%
Wabamun	West	0.6%	1.2%	0.6%	0.4%	0.6%
Wabamun 133A/133B	West	1.6%	2.2%	1.4%	0.7%	1.3%
Region Total		**1.9%**	**2.3%**	**1.5%**	**0.9%**	**1.4%**
Edmonton Total		1.6%	1.7%	1.3%	0.9%	1.2%
Capital Region Total		**1.7%**	**1.9%**	**1.4%**	**0.9%**	**1.3%**

EMPLOYMENT GROWTH PROJECTIONS

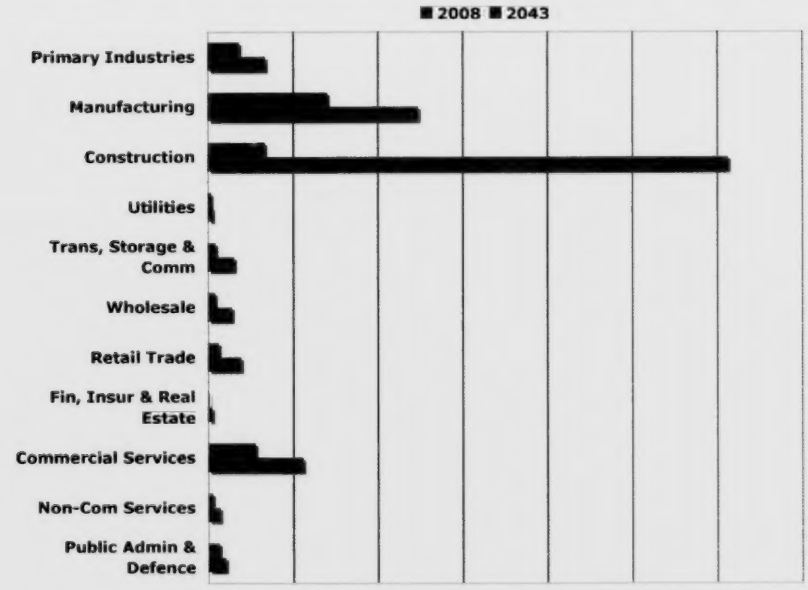
In addition to the allocation framework discussion provided previously, there are major employment areas in the Capital Region that deserve special recognition. These include: the Industrial Heartland, Port Alberta and Edmonton International Airport; Nisku Industrial Park; Acheson Industrial Area; Northeast Edmonton (Horsehills Industrial Area); Southeast Edmonton Industrial Area; Northwest Edmonton Industrial Area; and the Edmonton CBD/CBD Fringe & South Campus area. Each of these is discussed in the sections below.

Industrial Heartland

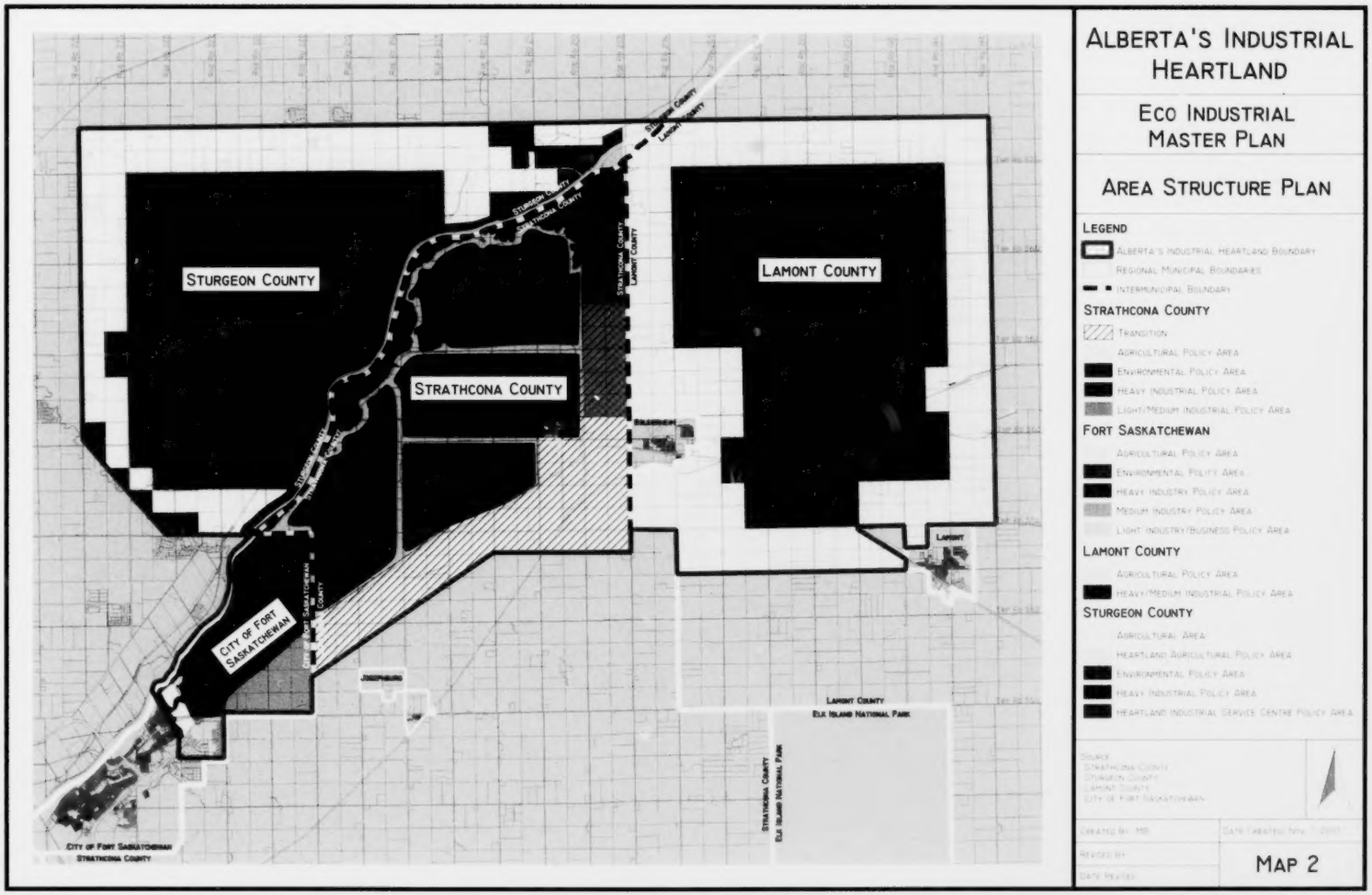
The Industrial Heartland encompasses portions of four municipalities[24] in the northeast sector of the Capital Region. This area will be the location of major industrial development associated with upgrading of oil and gas resources from the oil sands and elsewhere in the Province. While current economic conditions have created some uncertainty about the status, scope and timing of some projects, it has been assumed in this projection that projects will proceed, but at a slower rate than previously expected. The total employment impacts associated with the Industrial Heartland are comprised of construction, turnaround and operations workers.

At its peak, over thirty projects have been announced for the Industrial Heartland, but due to uncertain market conditions, some of the projects have been postponed or put on hold. It is expected that a slower place of project implementation will result in total employment in the Industrial Heartland increasing by 20,000 to 25,000 workers at peak times. The breakdown of employment by industry categories is provided in the figure below. Most of the employment growth is projected to fall in Construction, with significant growth (but smaller totals) in Manufacturing and Commercial Services.

Alberta Industrial Heartland Employment Industry Allocation



24 Strathcona County, Fort Saskatchewan, Sturgeon County and Lamont County


STURGEON COUNTY
STRATHCONA COUNTY
LAMONT COUNTY
CITY OF FORT SASKATCHEWAN
LAMONT
LAMONT COUNTY
ELK ISLAND NATIONAL PARK
STRATHCONA COUNTY
ELK ISLAND NATIONAL PARK
CITY OF FORT SASKATCHEWAN
STRATHCONA COUNTY
ALBERTA'S INDUSTRIAL HEARTLAND
ECO INDUSTRIAL MASTER PLAN
AREA STRUCTURE PLAN
LEGEND
ALBERTA'S INDUSTRIAL HEARTLAND BOUNDARY
REGIONAL MUNICIPAL BOUNDARIES
INTERMUNICIPAL BOUNDARY
STRATHCONA COUNTY
TRANSITION
AGRICULTURAL POLICY AREA
ENVIRONMENTAL POLICY AREA
HEAVY INDUSTRIAL POLICY AREA
LIGHT/MEDIUM INDUSTRIAL POLICY AREA
FORT SASKATCHEWAN
AGRICULTURAL POLICY AREA
ENVIRONMENTAL POLICY AREA
HEAVY INDUSTRY POLICY AREA
MEDIUM INDUSTRY POLICY AREA
LIGHT INDUSTRY/BUSINESS POLICY AREA
LAMONT COUNTY
AGRICULTURAL POLICY AREA
HEAVY/MEDIUM INDUSTRIAL POLICY AREA
STURGEON COUNTY
AGRICULTURAL AREA
HEARTLAND AGRICULTURAL POLICY AREA
ENVIRONMENTAL POLICY AREA
HEAVY INDUSTRIAL POLICY AREA
HEARTLAND INDUSTRIAL SERVICE CENTRE POLICY AREA
SOURCE
STRATHCONA COUNTY
STURGEON COUNTY
LAMONT COUNTY
CITY OF FORT SASKATCHEWAN
CREATED BY: MB
REVISED BY:
DATE CREATED: Nov. 1, 2007
DATE REVISED:
MAP 2

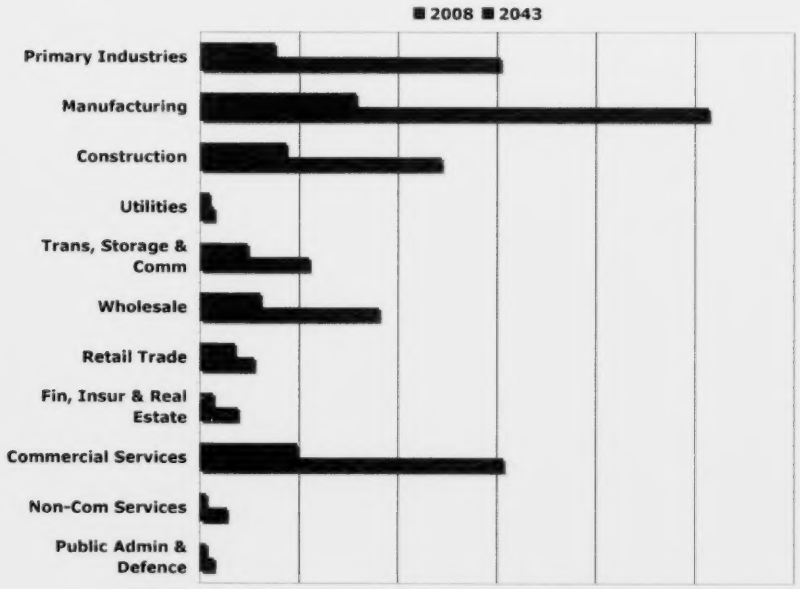
Edmonton International Airport and Port Alberta

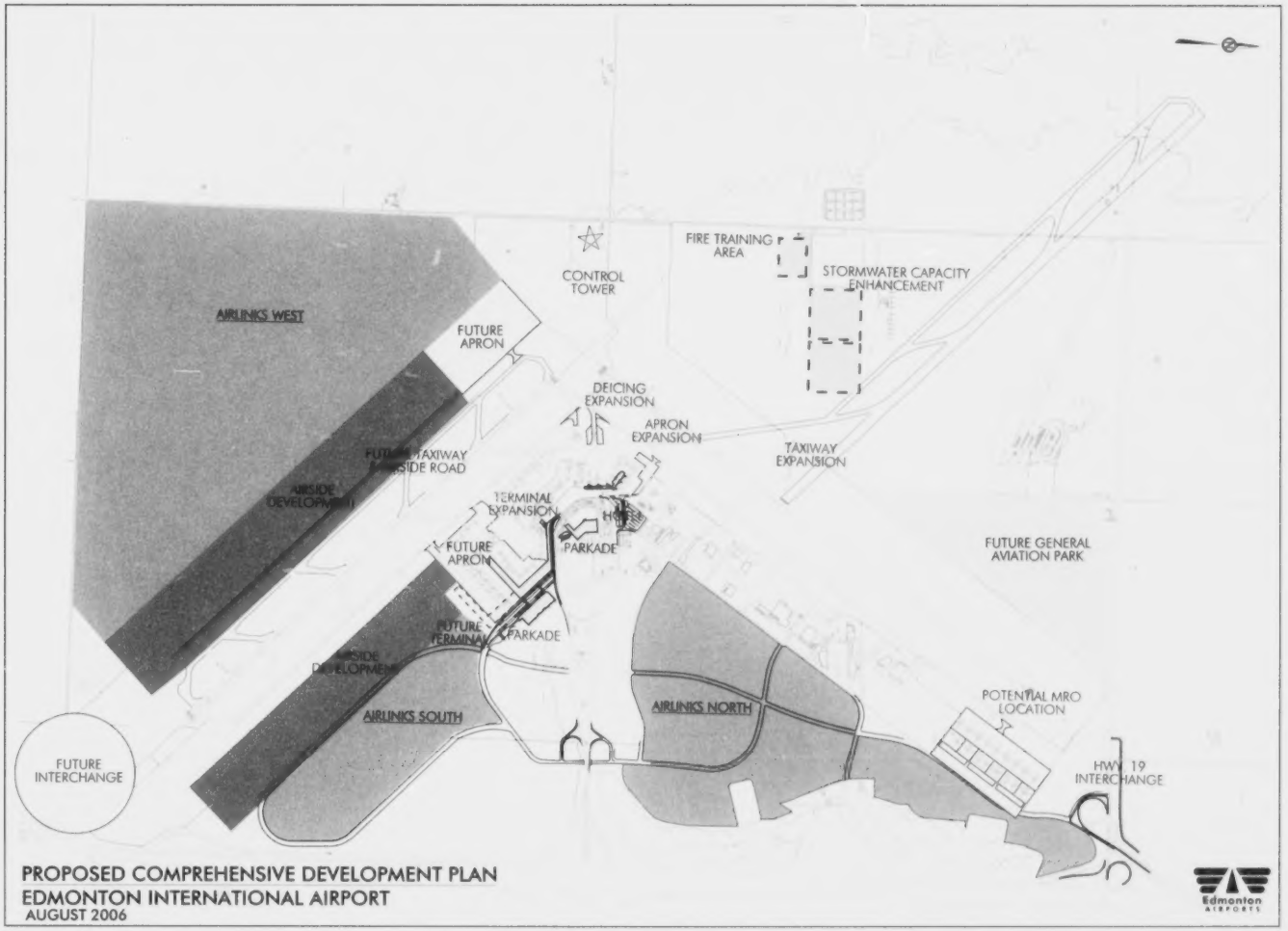
Edmonton Regional Airports Authority has undertaken a major initiative to create a multi-modal transportation hub located at the Edmonton International Airport. This initiative includes the creation of cargo and warehousing operations that will capitalize on the significant increase in rail cargo activity that will flow through Edmonton as a result of the expansion of the Port of Prince Rupert. Port Alberta will offer not only a point of trans-shipment for cargo, but also the opportunity for value added through a Free Trade Zone.

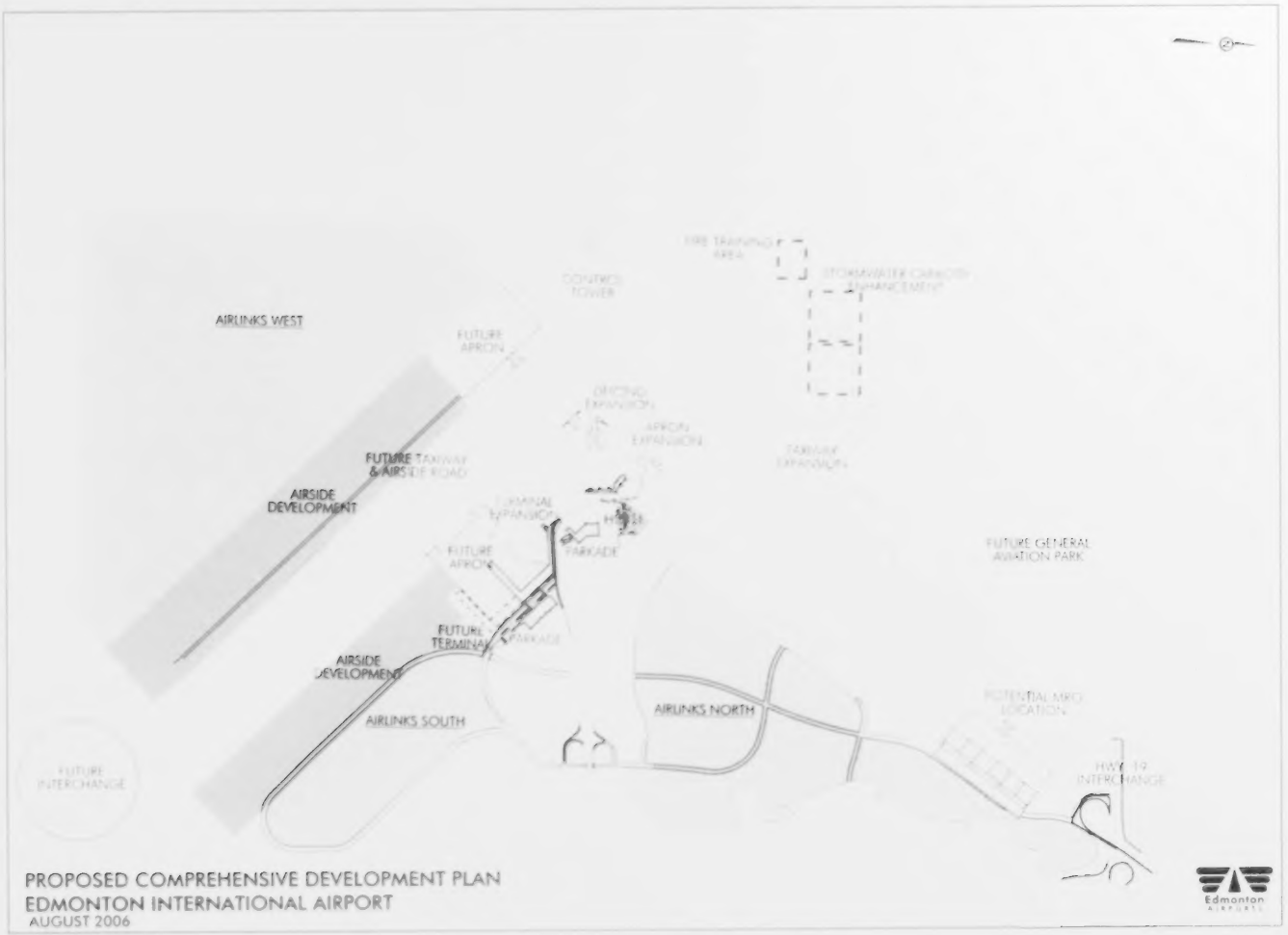
Total employment on airport lands, related to Port Alberta and passenger and cargo aviation activity at Edmonton International Airport is projected to increase by up to 20,000 to 25,000 jobs. This has been reduced from the previous projection somewhat, reflecting the more modest short term growth due to general economic conditions.

A broad mix of employment by industry is expected to be generated by the Port Alberta development and increased passenger and cargo aviation activity. As a result, there are six industry categories that are all projected to experience significant increases in employment over the period: Manufacturing; Commercial Services; Primary Industries; Construction; Wholesale Trade; and Transportation Storage and Communications.

Port Alberta Employment Industry Allocation




AIRLINKS WEST
FUTURE APRON
CONTROL TOWER
FIRE TRAINING AREA
STORMWATER CAPACITY ENHANCEMENT
DEICING EXPANSION
APRON EXPANSION
TAXIWAY EXPANSION
TERMINAL EXPANSION
PARKADE
FUTURE APRON
FUTURE GENERAL AVIATION PARK
FUTURE PARKADE
AIRLINKS SOUTH
AIRLINKS NORTH
POTENTIAL MRO LOCATION
FUTURE INTERCHANGE
HWY 19 INTERCHANGE
PROPOSED COMPREHENSIVE DEVELOPMENT PLAN
EDMONTON INTERNATIONAL AIRPORT
AUGUST 2006
Edmonton AIRPORTS



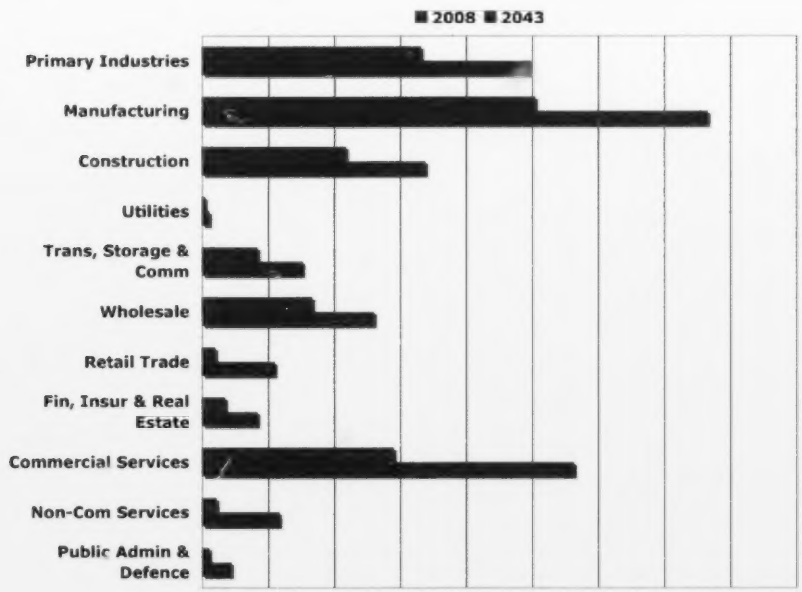
PROPOSED COMPREHENSIVE DEVELOPMENT PLAN
EDMONTON INTERNATIONAL AIRPORT
AUGUST 2006

Nisku

Nisku in Leduc County is the largest business and industrial park of its kind in Western Canada. Industry and businesses that support the oil and gas industry in Alberta and the oil sands comprise the majority of activity at Nisku. Growth is projected as the non-residential development will expand across the QEII Highway with new greenfield development for industrial and commercial development north of the Edmonton International Airport.

The mixed use commercial and industrial development north of the Edmonton International Airport is expected to compliment both existing and future growth in Nisku as well as that expected for Port Alberta[25]. This is reflected in the strong growth projected in the Commercial Services and Manufacturing sectors in this area. Other sectors projected to see significant increases are Primary Industries, Construction, Wholesale Trade and Retail Trade.

Nisku Industrial Park Employment Industry Allocation



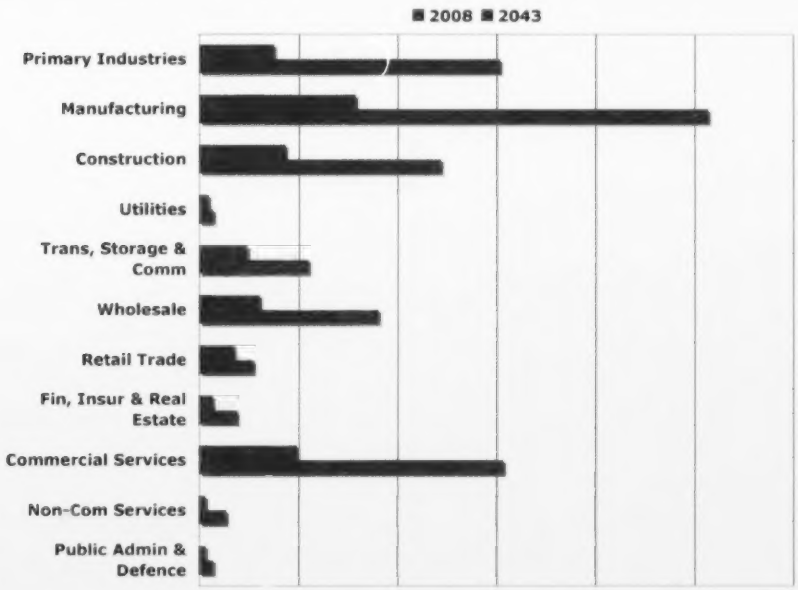
Acheson

The Acheson Industrial Area lies between Edmonton and Spruce Grove along Highway 16, Highway 16A and the CN Rail mainline. This industrial area will continue to attract light and medium industrial activity seeking good access to transportation routes and minimum serviced industrial lands.

25 City of Leduc & Leduc County Joint Sustainable Growth Study 2008-2060

Acheson also holds significant potential for employment growth. As this area evolves, it is expected to become more diverse supporting a greater variety of non-residential development. This is incorporated into the employment sectors that will experience the most growth in the projection. Manufacturing, Primary Industries and Commercial services are expected to grow by the widest margin. Construction, Wholesale Trade and Transportation, Storage and Communication are also expected to see significant growth.

Acheson Industrial Area Employment Industry Allocation



Proposed Northeast Edmonton Industrial (Horsehills Industrial Area)

Edmonton's draft Municipal Development Plan includes a large area in Northeast Edmonton, west of the Manning Freeway, for industrial development. The draft Area Structure Plan (ASP) for the area identifies that a mixture of petro-chemical, manufacturing, logistics and other commercial activities (e.g. research and development, education and other services) would be designated for the area[26]. It is expected that this area will compete with or complement the Industrial Heartland for major industrial projects as well as related spin-off and commercial activity. A Land Development Concept map from the draft ASP shows the proposed industrial development west of the Manning Freeway.

26 Draft Horsehills Industrial Area Structure Plan, City of Edmonton, October 2008.

Northeast Edmonton Industrial (Horsehills Industrial Area)

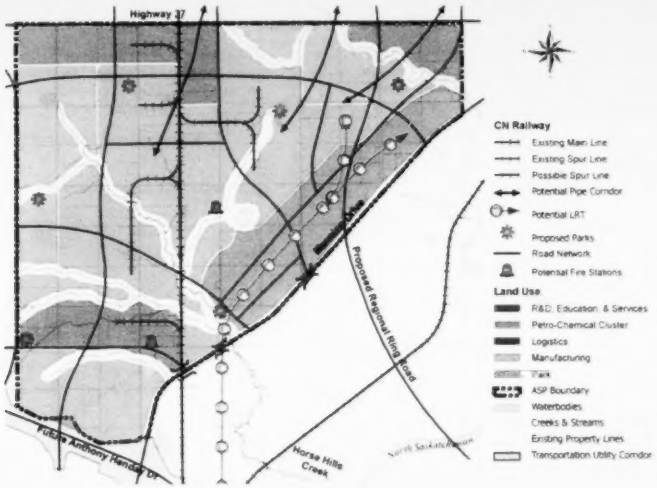
Development opportunities in the Northeast Edmonton Industrial area include:

- Residential development in Traffic District 29[27]; north of the ring road and east of the Manning Freeway.
- In Traffic District 29, the ASP assumes that two major heavy industrial projects consistent with the creation of a petro-chemical cluster would be completed and operational in the projection period.
- Additional light and medium industrial development associated with the heavy industrial development in the NE area and Industrial Heartland would also occur in Traffic District 29.
- Commercial development associated with both the industrial development in Traffic District 29 and residential development in Traffic District 30[28] would proceed along the Manning Freeway.

The industrial area west of Manning Freeway is further defined in the draft ASP. This area would offer a diverse range of employment opportunities, which is reflected in industry sector projections. Four sectors are projected to capture the majority of employment growth in this area: Commercial Services; Manufacturing; Retail Trade and Wholesale Trade.

27 See Appendix A: Industrial Land Supply and Demand
28 See Appendix A: Industrial Land Supply and Demand

Northeast Edmonton Industrial (Horsehills Industrial Area)



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- Residential development in Traffic District 29[27]; north of the ring road and east of the Manning Freeway.
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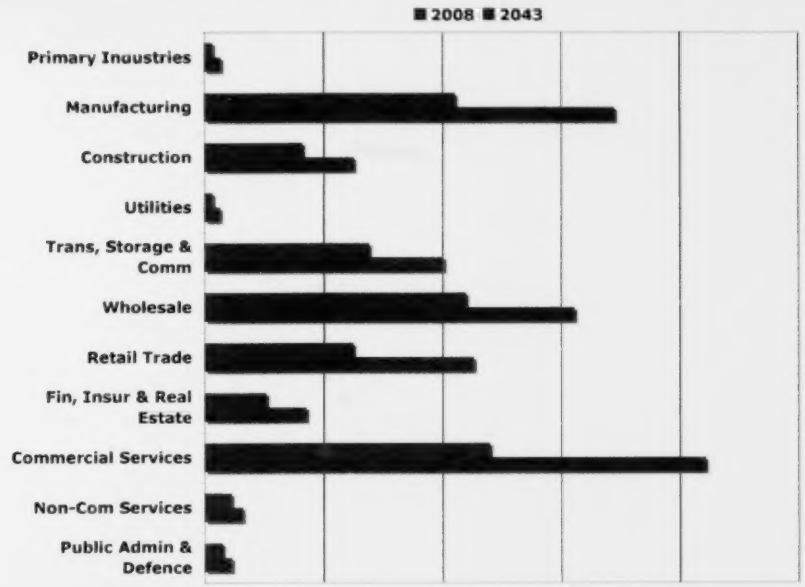
- Additional light and medium industrial development associated with the heavy industrial development in the NE area and Industrial Heartland would also occur in Traffic District 29.
- Commercial development associated with both the industrial development in Traffic District 29 and residential development in Traffic District 30[28] would proceed along the Manning Freeway.

The industrial area west of Manning Freeway is further defined in the draft ASP. This area would offer a diverse range of employment opportunities, which is reflected in industry sector projections. Four sectors are projected to capture the majority of employment growth in this area: Commercial Services; Manufacturing; Retail Trade and Wholesale Trade.

27 See Appendix A for location of District 29 in City of Edmonton.
28 See Appendix A for location of District 30 in City of Edmonton.

Northeast Edmonton Employment Industry Allocation



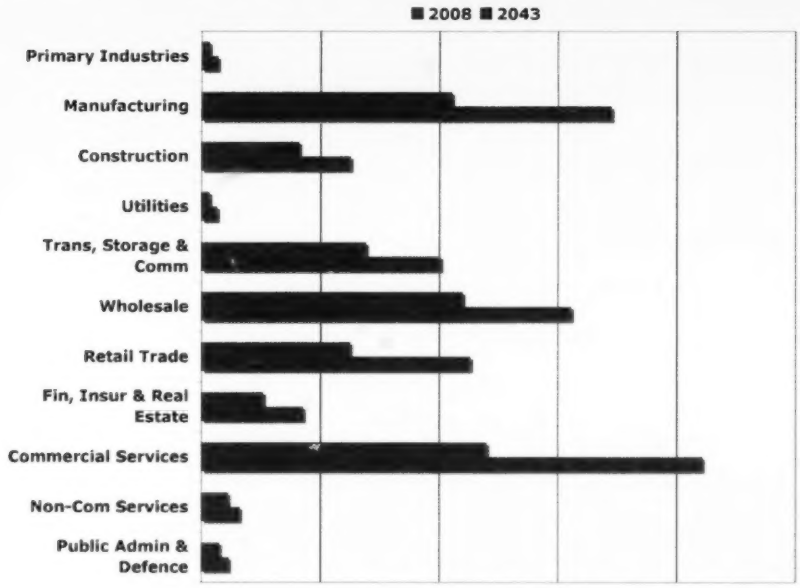
Edmonton Southeast Industrial

This industrial area of Edmonton is mature but still has capacity for infill development. This is identified as District 20[29] and includes Girard, Davies East, Weir, Roper and Pylypow Industrial areas.

These established industrial areas in Edmonton have a diverse range of employment across industry sectors. In this projection, significant growth is expected in Manufacturing and Commercial Services. Growth is also projected for Retail Trade, Construction, Wholesale Trade and Transportation, Storage and Communication.

29 See Appendix A for location of District 20 in City of Edmonton

Edmonton Southeast Employment Industry Allocation



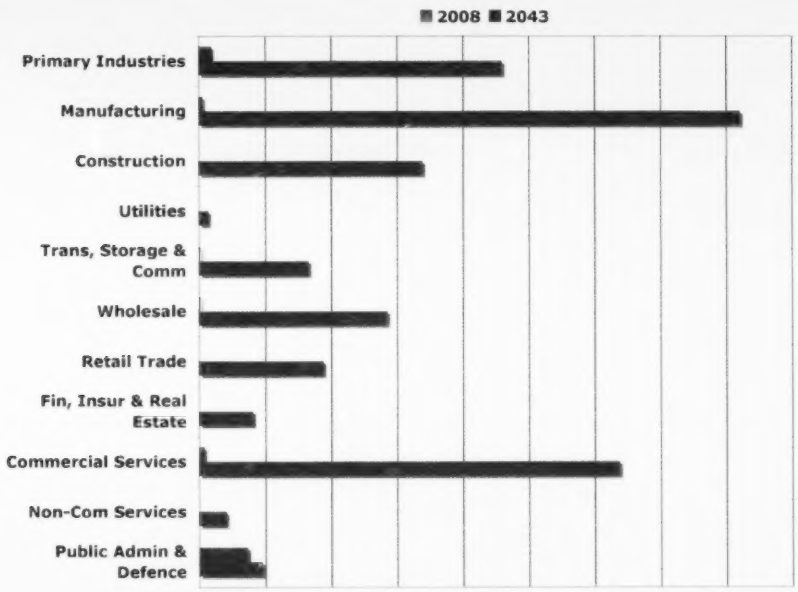
Edmonton Northwest Industrial

These areas form a growing and contiguous industrial and business commercial area in the northwest sector of Edmonton in Districts 7 and 17[30]. The Northwest Industrial area is mature with room for some infill development. Mistatim Industrial area has more capacity for growth and will see continued development around Anthony Henday, the CN Intermodal Yard and other areas.

This industrial area in Edmonton has a lot of room for growth. Access to Anthony Henday Drive and the CNR rail line and inter-modal yard provide a significant transportation advantage for the Manufacturing and Primary Industries sectors. Significant growth is projected for most major industry sectors for this area.

30 See Appendix A for location of District 7 and 17 in City of Edmonton

Edmonton Northwest Employment Industry Allocation



Edmonton CBD / CBD Fringe / University of Alberta South Campus

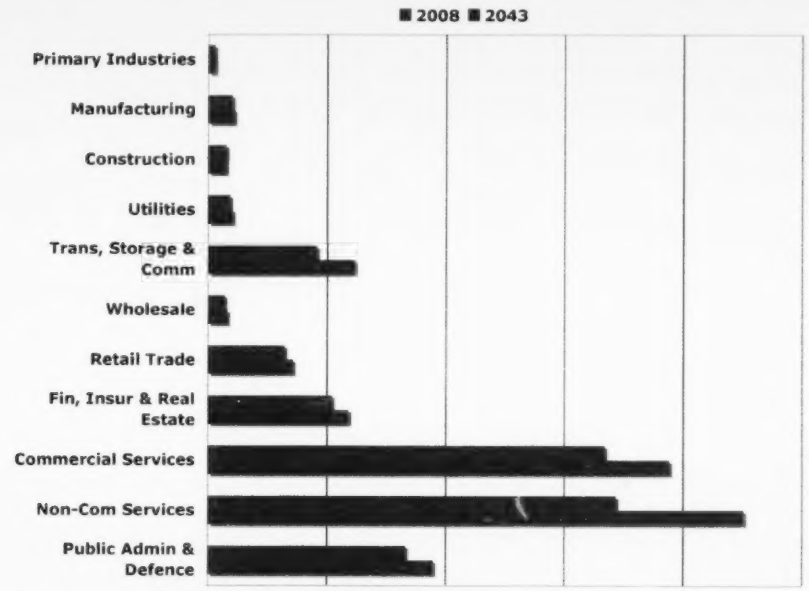
The downtown area of Edmonton in District 1[31], and areas adjacent in portions of District 22[32], and the University of Alberta's South Campus across the North Saskatchewan River in Districts 3[33] are major employment areas. It is expected that these areas will attract new business activity through intensification and infill development.

Employment in this area is heavily weighted to Commercial Services, Non-Commercial Services and Public Administration & Defence industry sectors. This is a result of the area being the home to government employers (federal, Provincial and municipal), as well as the three largest post-secondary institutions in the Capital Region (University of Alberta, NAIT and Grant MacEwan College (GMC)).

In addition to the intensification of development in the CBD and CBD fringe around the downtown areas north of the North Saskatchewan River, there is a significant amount of land held by the University of Alberta for development of their South Campus. It is expected that additional development will also occur on these lands over the projection period.

31 See Appendix A for location of District 1 in City of Edmonton
32 See Appendix A for location of District 22 in City of Edmonton
33 See Appendix A for location of District 3 in City of Edmonton

Edmonton CBD/CBD Fringe/ South Campus Employment Industry Allocation



EMPLOYMENT TABLES

The results of the Trend Scenario employment projections are provided in the tables below.

- Over the next 35 years, employment in the Capital Region is projected to grow to almost 830,000 jobs.
    - This growth of over 285,000 in the Capital Region represents an average annual growth rate of 1.2 percent.
- The employment of Edmonton is projected to grow from approximately 429,000 in 2008 to close to 617,000 in 2043.
    - This growth of almost 188,000 in Edmonton represents an average annual growth rate of 1.05 percent over the projection period.
- The rest of the Capital Region is projected to grow from approximately 118,000 jobs to over 214,000 by 2043.
    - This growth of just almost 100,000 in the Region represents an average annual growth rate of 1.7 percent over the projection period.

Trend Scenario Employment Projection by Municipality

Municipality	Quadrant	2008	2013	2018	2028	2043
Alexander 134	North	232	247	269	307	329
Bon Accord	North	236	264	301	370	424
Gibbons	North	654	768	894	1,098	1,257
Legal	North	434	459	506	592	636
Morinville	North	2,095	2,260	2,519	3,007	3,480
Redwater	North	1,065	1,132	1,227	1,360	1,557
St. Albert	North	16,935	17,504	18,336	20,699	22,486
Sturgeon County	North	10,202	13,677	16,426	18,665	21,155
Bruderheim	East	270	311	366	463	546
Fort Saskatchewan	East	7,959	10,664	11,937	13,917	15,169
Lamont County	East	1,118	1,162	1,232	1,337	1,399
Strathcona County	East	28,187	31,051	35,205	37,146	39,537
Town of Lamont	East	248	258	274	297	312
Beaumont	South	1,527	1,657	1,848	2,314	2,723
Calmar	South	558	624	682	825	927
Devon	South	1,477	1,751	1,938	2,403	2,723
Leduc City	South	6,991	7,705	8,670	10,331	11,314
Leduc County	South	15,335	18,075	23,691	33,605	48,155
New Sarepta	South	152	162	176	201	216
Thorsby	South	547	591	645	725	770
Warburg	South	387	408	439	479	509
Stony Plain 135 (Enoch)	West	1,198	1,321	1,485	1,737	1,865
Parkland County	West	7,106	8,907	11,639	13,649	17,347
Spruce Grove	West	7,440	7,771	8,018	9,193	9,857
Stony Plain	West	4,947	5,178	5,388	6,073	6,224
Wabamun	West	336	345	363	386	394
Wabamun 133A/133B	West	208	227	252	295	317
Region Total		**117,847**	**134,481**	**154,726**	**181,470**	**211,629**
Edmonton Total		428,890	450,883	490,503	549,916	620,370
Capital Region Total		**546,737**	**585,364**	**645,229**	**731,386**	**831,999**

Employment Projection - Average Annual Change (From Previous Period)

						Annual Avg Change 2008
Municipality	Quadrant	2013	2018	2028	2043	2043
Alexander 134	North	1.3%	1.7%	1.3%	0.5%	1.0%
Bon Accord	North	2.3%	2.7%	2.1%	0.9%	1.7%
Gibbons	North	3.3%	3.1%	2.1%	0.9%	1.9%
Legal	North	1.1%	2.0%	1.6%	0.5%	1.1%
Morinville	North	3.3%	3.5%	2.3%	1.0%	2.0%
Redwater	North	1.2%	1.6%	1.0%	0.9%	1.1%
St. Albert	North	1.0%	1.1%	1.3%	0.6%	0.9%
Sturgeon County	North	5.9%	3.6%	1.2%	0.8%	2.0%
Bruderheim	East	2.9%	3.3%	2.4%	1.1%	2.0%
Fort Saskatchewan	East	3.3%	3.7%	0.7%	0.6%	1.4%
Lamont County	East	0.8%	1.2%	0.8%	0.3%	0.6%
Strathcona County	East	3.3%	3.2%	0.9%	0.5%	1.4%
Town of Lamont	East	0.8%	1.2%	0.8%	0.3%	0.7%
Beaumont	South	2.3%	2.7%	2.4%	1.4%	2.0%
Calmar	South	2.3%	2.7%	2.1%	0.9%	1.7%
Devon	South	3.5%	3.1%	2.3%	0.9%	2.0%
Leduc City	South	2.0%	2.0%	1.6%	0.5%	1.2%
Leduc County	South	3.3%	4.1%	3.6%	2.5%	3.2%
New Sarepta	South	1.3%	1.7%	1.3%	0.5%	1.0%
Thorsby	South	1.6%	1.8%	1.2%	0.4%	1.0%
Warburg	South	1.1%	1.5%	0.9%	0.4%	0.8%
Stony Plain 135 (Enoch)	West	2.0%	2.4%	1.6%	0.5%	1.3%
Parkland County	West	2.0%	2.4%	1.6%	1.1%	1.5%
Spruce Grove	West	2.0%	2.1%	1.9%	0.9%	1.5%
Stony Plain	West	2.1%	2.5%	2.0%	1.1%	1.7%
Wabamun	West	0.6%	1.0%	0.6%	0.1%	0.5%
Wabamun 133A/133B	West	1.8%	2.2%	1.6%	0.5%	1.2%
Region Total		**2.8%**	**2.9%**	**1.7%**	**1.0%**	**1.7%**
Edmonton Total		1.0%	1.7%	1.1%	0.8%	1.0%
Capital Region Total		**1.4%**	**2.0%**	**1.3%**	**0.9%**	**1.2%**

SECTION 4

AN ALTERNATE SCENARIO

The purpose of this section of the Report is to provide background on the key assumptions used in developing the municipal projections of population and employment in the Alternate Scenario.

OVERVIEW OF THE ALTERNATE SCENARIO

The Alternate Scenario projects the development of the Capital Region within the time frame, 2008 to 2043, based on a consideration of various factors, including a Regional intermunicipal transit network that includes LRT and Transit-Oriented development throughout the Capital Region. The Alternate Scenario puts more emphasis on compact growth for long-term sustainable development in the Capital Region with a stronger focus on public transportation. Development in this Alternate Scenario is more oriented to expanding "up" or densifying as compared to the Trend Scenario.

It is important to note that the projections in the Alternate Scenario are one interpretation of the Land Use Principles Policies that can be used as a Regional planning tool for consideration as to how these policies could be reflected in the distribution of population and employment in the Capital Region. It provides information for preliminary long-term planning purposes that was required to complete the components of the Capital Region Growth Plan, specifically Land Use, Transit and Housing Plans.

DEFINITION OF THE ALTERNATE SCENARIO

The Alternate Scenario is a blend of two strategies that integrate advanced development of public transportation and LRT with more compact growth aimed at minimizing the development footprint in the Region and being more environmentally and ecologically sensitive.

With respect to public transportation, this Scenario assumes there will potentially be a higher level of development of the public transportation system in the Region and an extension of LRT service in five directions (from its current two directions) from the Edmonton CBD. This emphasis on public transportation has an impact on development forms that support infill development and increased density of development that takes advantage of existing infrastructure. In addition, it encourages putting workers and their jobs closer together, thus reducing the need for work to home trips. Consistent with this direction, it has been assumed the proposed outer ring road may not be completed in the projection period. Funding that would have been put toward this infrastructure is assumed to be directed at public transit.

On the environmental side, compact growth will be encouraged to minimize the development footprint in the Region. Further, it will encourage efficiencies in the delivery of municipal services through reducing the extent of linear infrastructure and providing for more compact services areas. Encouraging compact development will have the additional benefit of helping to conserve ecological or culturally sensitive areas, preserving natural vegetation, protecting soils, maintain wildlife corridors, wetlands and unique landscape features in the Region.

These two components are compatible and work together to make development more compact, better utilizing the land resources of the Region. In addition, it informs decisions about the form of urban development by encouraging walkable communities that are located in closer proximity to public transportation, thus reducing dependency on automobiles.

Development of the Alternate Scenario

Development of the Alternate Scenario has been a collaborative process involving the Land Use, Transit and Housing initiatives of the Capital Region Board. This was necessary to ensure that the assumptions and analysis in each area used a consistent set of information.

A series of preliminary Land Use Principles and Policies were developed that guided the Land Use Plan for the Capital Region and the direction of future development in the Alternate Scenario. These preliminary Principles are as follows:

1. Protect the Environment and Resources
    a. Protect environmentally important and hazard lands from development.
    b. Conserve valuable, highly productive agricultural lands.
    c. Protect natural resources such as gravel, sand and coal.
    d. Minimize the impact of development on Regional watersheds and airsheds.
2. Minimize Regional Footprint
    a. Identify and protect multi-use corridors for Regional infrastructure.
    b. Encourage land use densification that supports the use of public transit.
    c. Concentrate new growth along transit corridors and Priority Growth Areas.
    d. Cluster development around existing and potential employment centres.
    e. Support innovative clustered rural residential developments that utilize central water and sanitary services.
    f. Support continue incremental growth of Regional towns and villages.
    g. Support medium and higher density residential housing forms in all Capital Region municipalities
3. Build Inclusive Communities
    a. Create inclusive communities complete with employment opportunities, various forms and choice of housing, social, cultural, educational and recreational opportunities.
    b. Support the development of intensive mixed uses along transit corridors.
    c. Support the distribution of jobs and housing along transit corridors.
    d. Provide innovative and affordable housing options throughout the Capital Region.
    e. Support healthy communities.
4. Increase Transportation Choice
    a. Support a transportation system that is integrated with land uses.
    b. Support the expansion of transit service in various forms and supporting infrastructure.
    c. Plan, manage and protect the development of roadway and highway facilities in a manner that encourages effective transit service.
    d. Support inclusive communities that reduce the need for intra-Regional travel.

5. Efficient Provision of Services
    a. Coordinate planned and integrated Regional services.
    b. Coordinate development with timing and location of infrastructure.
    c. Increase the utilization of existing infrastructure.
6. Regional Economic Development
    a. Ensure the supply of a diverse land base to sustain a variety of economic development activities.
    b. Support and retain vibrant, inclusive communities that encourage diversity and attract the best and brightest people to the Region.
7. Ensure Implementation
    a. The costs of Regional services, applicable to this land use plan, should be shared equitably.
    b. Ensure the efficient movement of goods and services throughout the Region.
    c. The Regional plan allows municipalities to make local decisions consistent with the Regional vision, Land Use Principles and Policies.
    d. Review the Regional land use plan regularly to ensure that it is current, relevant, and able to be amended as required to meet Regional objectives.

Development of the Alternate Scenario Population and Employment Projections

Based on earlier working versions of the Land Use Principles and Policies, preliminary population and employment projections for the Region and individual municipalities were presented to the Committee for discussion. The same information was also used to inform the work of the Transit and Housing Plans.

The Committee considered the projections at a workshop on November 17, 2008. Feedback from Committee members led to several versions of the projections being developed prior to the final projections being completed in the Municipal Summaries section of this Report.

MOBILITY ASSUMPTIONS

Mobility is a major factor in defining the potential for development. The Alternate Scenario by design, assumes a higher level of development of the public transportation system in the Region, including LRT. For the purposes of this Scenario, it is assumed that the following extensions could be made to the LRT system:

- Extension of the northeast line to Anthony Henday Drive. The northeast line exists in the Trend Scenario but is not extended from Clareview to Anthony Henday Drive.
- Extension of the southwest line to Anthony Henday Drive. This is included in the Trend Scenario.
- Development of a new line northwest to St. Albert up to Anthony Henday Drive. The development of this line has been assumed to be completed to NAIT in the Trend Scenario.

- Development of a new line southeast from the Edmonton CBD through Millwoods to Anthony Henday Drive.
- Development of a new line west from the Edmonton CBD past West Edmonton Mall to Lewis Estates.

In addition to LRT development, it is expected that there would be significant enhancement to other public transit services both within the City of Edmonton and elsewhere in the Region.

With the concentration on public transit, it is assumed that focus of development of the ring road system may be diminished after completion of Anthony Henday Drive. As a result, the outer ring road may not be completed within the projection timeframe.

POPULATION GROWTH PROJECTIONS

The projection of population growth for each municipality in the Region in the Alternate Scenario is summarized below and shown in the Municipal Summaries section of this Report.

Edmonton Regional Shares

In contrast to the Trend Scenario, the proportion of total population that will reside in Edmonton will increase over the projection period, from 70 percent in 2008 to 72 percent by 2043. This reflects the shift of residential development consistent with the Land Use Principles and Policies for the Alternate Scenario.

POPULATION TABLES

The results of the Alternate Scenario population projections are summarized below and shown in the tables following:

- Over the next 35 years, the population of the Capital Region is the same as the Trend Scenario, projected to grow to over 1.7 million people.
    - This growth of almost 613,000 in the Capital Region represents an average annual growth rate of 1.3 percent.
- The population of Edmonton is projected to grow from approximately 767,000 in 2008 to 1.174 million in 2043.
    - This growth of almost 408,000 in Edmonton represents an average annual growth rate of 1.3 percent over the projection period. This growth represents an additional 29,000 as compared to the Trend Scenario.
- The rest of the Capital Region is projected to grow from approximately 325,000 people to 530,000 by 2043.
    - This growth of just over 205,000 in the Region represents an average annual growth rate of 1.4 percent over the projection period. Correspondingly, the Region growth is 29,000 lower in the Alternate Scenario as compared to the Trend Scenario.

Alternate Scenario Population Projection by Municipality

Municipality	Quadrant	2008	2013	2018	2028	2043
Alexander 134	North	976	1,033	1,126	1,257	1,405
Bon Accord	North	1,603	1,781	2,039	2,452	2,950
Gibbons	North	2,906	3,729	4,446	5,945	7,348
Legal	North	1,252	1,357	1,516	1,735	1,938
Morinville	North	7,228	7,730	7,992	8,555	9,801
Redwater	North	2,302	3,057	3,927	5,020	6,235
St. Albert	North	58,501	64,996	72,606	85,191	99,998
Sturgeon County	North	19,204	19,810	21,135	23,219	25,608
Bruderheim	East	1,385	1,585	1,867	2,313	2,783
Fort Saskatchewan	East	17,243	21,162	25,591	33,826	41,913
Lamont County	East	3,937	3,966	4,170	4,492	4,661
Strathcona County	East	84,415	89,787	98,769	110,892	119,891
Town of Lamont	East	1,689	1,743	1,853	1,970	2,094
Beaumont	South	10,820	11,921	13,011	15,043	17,752
Calmar	South	2,004	2,177	2,349	2,565	2,788
Devon	South	6,400	7,110	7,639	8,538	9,777
Leduc City	South	20,529	23,830	30,211	37,963	43,795
Leduc County	South	12,985	15,802	21,175	27,753	33,110
New Sarepta	South	417	441	481	537	600
Thorsby	South	964	1,045	1,167	1,336	1,493
Warburg	South	632	669	729	794	887
Stony Plain 135 (Enoch)	West	1,521	1,649	1,842	2,109	2,355
Parkland County	West	29,850	30,861	31,150	31,887	32,231
Spruce Grove	West	22,380	24,565	26,776	30,904	36,191
Stony Plain	West	14,310	15,399	17,199	19,887	24,125
Wabamun	West	610	629	669	712	756
Wabamun 133A/133B	West	1,300	1,409	1,574	1,802	2,013
Region Total		**327,363**	**359,242**	**403,010**	**468,697**	**534,500**
Edmonton Total		766,742	829,058	902,583	1,029,625	1,174,279
Capital Region Total		**1,094,105**	**1,188,300**	**1,305,593**	**1,498,322**	**1,708,779**

Population Projection - Average Annual Change (From Previous Period)

Municipality	Quadrant	2013	2018	2028	2043	Annual Avg Change 2008 2043
Alexander 134	North	1.1%	1.7%	1.1%	0.7%	1.0%
Bon Accord	North	2.1%	2.7%	1.9%	1.2%	1.8%
Gibbons	North	5.1%	3.6%	2.9%	1.4%	2.7%
Legal	North	1.6%	2.2%	1.4%	0.7%	1.3%
Morinville	North	1.4%	0.7%	0.7%	0.9%	0.9%
Redwater	North	5.8%	5.1%	2.5%	1.5%	2.9%
St. Albert	North	2.1%	2.2%	1.6%	1.1%	1.5%
Sturgeon County	North	0.6%	1.3%	0.9%	0.7%	0.8%
Bruderheim	East	2.7%	3.3%	2.2%	1.2%	2.0%
Fort Saskatchewan	East	4.2%	3.9%	2.8%	1.4%	2.6%
Lamont County	East	0.1%	1.0%	0.7%	0.2%	0.5%
Strathcona County	East	1.2%	1.9%	1.2%	0.5%	1.0%
Town of Lamont	East	0.6%	1.2%	0.6%	0.4%	0.6%
Beaumont	South	2.0%	1.8%	1.5%	1.1%	1.4%
Calmar	South	1.7%	1.5%	0.9%	0.6%	0.9%
Devon	South	2.1%	1.4%	1.1%	0.9%	1.2%
Leduc City	South	3.0%	4.9%	2.3%	1.0%	2.2%
Leduc County	South	4.0%	6.0%	2.7%	1.2%	2.7%
New Sarepta	South	1.1%	1.7%	1.1%	0.7%	1.0%
Thorsby	South	1.6%	2.2%	1.4%	0.7%	1.3%
Warburg	South	1.1%	1.7%	0.9%	0.7%	1.0%
Stony Plain 135 (Enoch)	West	1.6%	2.2%	1.4%	0.7%	1.3%
Parkland County	West	0.7%	0.2%	0.2%	0.1%	0.2%
Spruce Grove	West	1.9%	1.7%	1.4%	1.1%	1.4%
Stony Plain	West	1.5%	2.2%	1.5%	1.3%	1.5%
Wabamun	West	0.6%	1.2%	0.6%	0.4%	0.6%
Wabamun 133A/133B	West	1.6%	2.2%	1.4%	0.7%	1.3%
Region Total		**1.9%**	**2.3%**	**1.5%**	**0.9%**	**1.4%**
Edmonton Total		1.6%	1.7%	1.3%	0.9%	1.2%
Capital Region Total		**1.7%**	**1.9%**	**1.4%**	**0.9%**	**1.3%**

EMPLOYMENT GROWTH PROJECTIONS

The projection of employment growth for each municipality in the Region in the Alternate Scenario is summarized below and discussed in the Municipal Summaries section of this Report.

Major Employment Areas

The major employment areas defined in the Trend Scenario are largely the same for the Alternate Scenario. In some instances, employment totals have been increased to reflect a concentration of development consistent with the Land Use Principles and Policies. A notable exception to this is the development included in the Trend Scenario for Northeast Edmonton. In the Alternate Scenario, population and employment growth in Northeast Edmonton has been reallocated[34].

EMPLOYMENT TABLES

- Consistent with the Trend Scenario, total employment in the Capital Region is projected to grow to almost 830,000 jobs by 2043.
    - This growth of over 280,000 in the Capital Region represents an average annual growth rate of 1.2 percent.
- The employment of Edmonton is projected to grow from approximately 429,000 in 2008 to close to just over 620,000 in 2043.
    - This growth of 191,000 jobs in Edmonton represents an average annual growth rate of 1.1 percent over the projection period.
- The rest of the Capital Region is projected to grow from approximately 118,000 jobs to 212,000 by 2043.
    - This growth of approximately 94,000 jobs in the Region represents an average annual growth rate of 1.7 percent over the projection period.

34 In the Alternate Scenario, development as outlined in the City of Edmonton's Draft Horsehills Industrial Area Structure Plan is accommodated in the Capital Region Land Use Plan, but due to uncertainties regarding the scope of development that could occur in this area, no growth has been allocated at the time of preparing this projection.

Alternate Scenario Employment Projection by Municipality

Municipality	Quadrant	2008	2013	2018	2028	2043
Alexander 134	North	232	247	269	307	329
Bon Accord	North	236	264	301	370	424
Gibbons	North	654	768	894	1,098	1,257
Legal	North	434	459	506	592	636
Morinville	North	2,095	2,260	2,519	3,007	3,480
Redwater	North	1,065	1,132	1,227	1,360	1,557
St. Albert	North	16,935	17,504	18,336	20,699	22,486
Sturgeon County	North	10,202	13,677	16,426	18,665	21,155
Bruderheim	East	270	311	366	463	546
Fort Saskatchewan	East	7,959	10,664	11,937	13,917	15,169
Lamont County	East	1,118	1,162	1,232	1,337	1,399
Strathcona County	East	28,187	31,051	35,205	37,146	39,537
Town of Lamont	East	248	258	274	297	312
Beaumont	South	1,527	1,657	1,848	2,314	2,723
Calmar	South	558	624	682	825	927
Devon	South	1,477	1,751	1,938	2,403	2,723
Leduc City	South	6,991	7,705	8,670	10,331	11,314
Leduc County	South	15,335	18,075	23,691	33,605	48,155
New Sarepta	South	152	162	176	201	216
Thorsby	South	547	591	645	725	770
Warburg	South	387	408	439	479	509
Stony Plain 135 (Enoch)	West	1,198	1,321	1,485	1,737	1,865
Parkland County	West	7,106	8,907	11,639	13,649	17,347
Spruce Grove	West	7,440	7,771	8,018	9,193	9,857
Stony Plain	West	4,947	5,178	5,388	6,073	6,224
Wabamun	West	336	345	363	386	394
Wabamun 133A/133B	West	208	227	252	295	317
Region Total		**117,847**	**134,481**	**154,726**	**181,470**	**211,629**
Edmonton Total		428,890	450,883	490,503	549,916	620,370
Capital Region Total		**546,737**	**585,364**	**645,229**	**731,386**	**831,999**

Employment Projection - Average Annual Change (From Previous Period)

Municipality	Quadrant	2013	2018	2028	2043	Annual Avg Change 2008 2043
Alexander 134	North	1.3%	1.7%	1.3%	0.5%	1.0%
Bon Accord	North	2.3%	2.7%	2.1%	0.9%	1.7%
Gibbons	North	3.3%	3.1%	2.1%	0.9%	1.9%
Legal	North	1.1%	2.0%	1.6%	0.5%	1.1%
Morinville	North	1.5%	2.2%	1.8%	1.0%	1.5%
Redwater	North	1.2%	1.6%	1.0%	0.9%	1.1%
St. Albert	North	0.7%	0.9%	1.2%	0.6%	0.8%
Sturgeon County	North	6.0%	3.7%	1.3%	0.8%	2.1%
Bruderheim	East	2.9%	3.3%	2.4%	1.1%	2.0%
Fort Saskatchewan	East	6.0%	2.3%	1.5%	0.6%	1.9%
Lamont County	East	0.8%	1.2%	0.8%	0.3%	0.6%
Strathcona County	East	2.0%	2.5%	0.5%	0.4%	1.0%
Town of Lamont	East	0.8%	1.2%	0.8%	0.3%	0.7%
Beaumont	South	1.7%	2.2%	2.3%	1.1%	1.7%
Calmar	South	2.3%	1.8%	1.9%	0.8%	1.5%
Devon	South	3.5%	2.1%	2.2%	0.8%	1.8%
Leduc City	South	2.0%	2.4%	1.8%	0.6%	1.4%
Leduc County	South	3.3%	5.6%	3.6%	2.4%	3.3%
New Sarepta	South	1.3%	1.7%	1.3%	0.5%	1.0%
Thorsby	South	1.6%	1.8%	1.2%	0.4%	1.0%
Warburg	South	1.1%	1.5%	0.9%	0.4%	0.8%
Stony Plain 135 (Enoch)	West	2.0%	2.4%	1.6%	0.5%	1.3%
Parkland County	West	4.6%	5.5%	1.6%	1.6%	2.6%
Spruce Grove	West	0.9%	0.6%	1.4%	0.5%	0.8%
Stony Plain	West	0.9%	0.8%	1.2%	0.2%	0.7%
Wabamun	West	0.6%	1.0%	0.6%	0.1%	0.5%
Wabamun 133A/133B	West	1.8%	2.2%	1.6%	0.5%	1.2%
Region Total		**2.7%**	**2.8%**	**1.6%**	**1.0%**	**1.7%**
Edmonton Total		1.0%	1.7%	1.1%	0.8%	1.1%
Capital Region Total		**1.4%**	**2.0%**	**1.3%**	**0.9%**	**1.2%**

SECTION 5

MUNICIPAL SUMMARIES

This section of the Report reviews the assumptions and results of the population and employment projection for each municipality in the Capital Region. Each municipal summary includes[35]:

- Population & employment projections for the Trend and Alternate Scenarios.
- Municipal assumptions for both the Trend and Alternate Scenarios.
- Planning documents used to guide population & employment projections.
- Housing starts information
- Summary of major projects

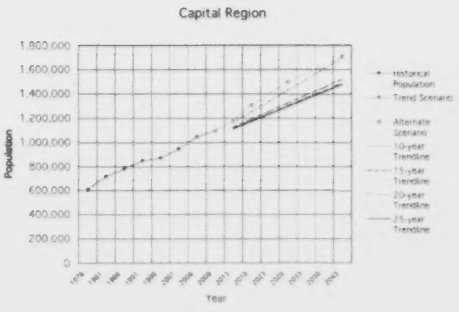
CAPITAL REGION

The Trend Scenario and the Alternate Scenarios use the same total population and employment growth for the Capital Region. The aggregate population projection exceeds the highest trendline (ten year) for all of the projection period, most notably during the period 2018 to 2028. Near the end of the projection period in 2043, the aggregate population projection slows and roughly matches the ten year trendline.

Population

The Edmonton CMA population is projected to grow from 1,094,105 in 2008 to 1,708,779 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.3 percent over the projection period.

In the Alternate Scenario, the population is projected to grow from 1,094,105 in 2008 to 1,708,779 in 2043. This growth reflects an average annual change of 1.3 percent over the projection period.



35 This information is only provided where available.

Employment

Total employment is projected to grow from 546,737 in 2008 to 831,999 in 2043. This growth reflects an average annual change of 1.2 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 546,737 in 2008 to 831,999 in 2043. This growth reflects an average annual change of 1.2 percent over the projection period.

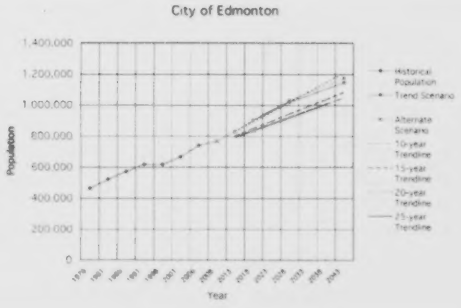
CITY OF EDMONTON

Between 1976 and 1991, the City of Edmonton grew steadily. After little growth in 1996, another economic upturn resulted in Edmonton reaching a population of 766,742. Over the entire 32 year period from 1976 to 2008, Edmonton has grown at an average annual rate of 1.6 percent.

Population

The City of Edmonton population is projected to grow from 766,742 in 2008 to 1,145,279 in 2043. This growth reflects an average annual change of 1.2 percent over the projection period.

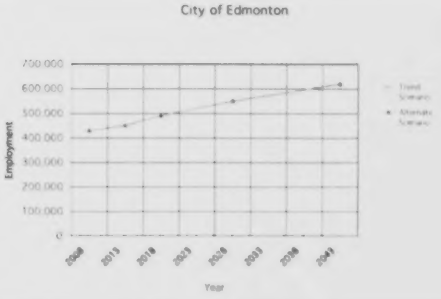
In the Alternate Scenario, the population is projected to grow from 766,742 in 2008 to 1,174,279 in 2043. This growth reflects an average annual change of 1.2 percent over the projection period.



Employment

Total employment is projected to grow from 428,890 in 2008 to 617,170 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow 428,890 in 2008 to 620,370 in 2043. This growth reflects an average annual change of 1.1 percent over the projection period.



Trend Scenario

The relatively rapid rate of population growth experienced by Edmonton over the past ten years is projected to be sustained until 2026. Following 2026, total population growth remains positive, but at a slightly reduced rate.

Employment growth in the City of Edmonton in this scenario is strong, but does not keep pace with population growth. In 2008, the City has a population/employment ratio of 1.79 which declines to 1.86 by 2043.

Alternate Scenario

In the Alternate Scenario, the City of Edmonton is projected to have a greater share of the Region population total, increasing by 29,000 over the 2043 population achieved in the Trend Scenario. This increased population reflects the advancement of transit system improvements and related Transit-Oriented Development, other intensification and infill development in existing city neighbourhoods as well as possible development of lands at the City Centre Airport or University Farm.

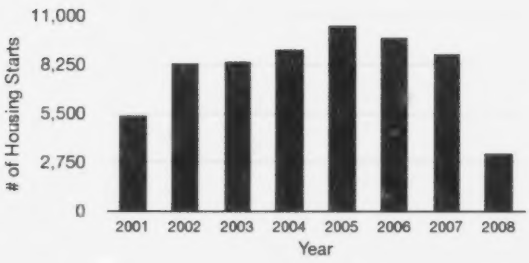
Employment in the Alternate Scenario does not keep pace with population growth, increasing by 3,200 over the Trend Scenario. The increase in population attributed to Edmonton, and resulting increase in employment associated with population growth, has been offset by shifting employment from the North East area to various locations in the Region.

City of Edmonton Planning Documents Used to Guide Population / Employment Projections include:[36]

- 2008 Municipal Census
- (MDP) Municipal Development Plan (Draft)
- (TMP) Transportation Master Plan (Draft)
- (ASP) Area Structure Plans
- (NASP) Neighbourhood Area Structure Plans
- (NSP) Neighbourhood Structure Plans
- (ARP) Area Redevelopment Plans
- (SCDB) Servicing Concept Design Brief
- (OP) Outline Plan

36 http://www.edmonton.ca/portal/server.pt/gateway/PTARGS_0_0_284_220_0_43/http%3B/CMSServer/COEWeb/infrastructure+planning+and+building/planning/

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Biofuels	2	140,000,000
Commercial/Retail	34	2,990,900,000
Infrastructure	40	4,050,600,000
Institutional	40	3,262,800,000
Other Industrial	4	53,500,000
Power	2	332,000,000
Residential	31	1,554,100,000
Tourism/Recreational	21	855,100,000
Total	**174**	**$13,239,000,000**

Included in the major projects summarized above are the following:

- Qualico Development, EPCOR Office Tower, $250 million. Under construction 2008-2012.
- ProCura Real Estate / Westbanks Projects Corp, Heritage Mall redevelopment to Century Park mixed-use development, $600 million. Under construction. Start phase 3, part 2 (condominium building) August 2009.
- City of Edmonton, LRT extension south to 23 Avenue (Century Park), $723 million. Under construction.
- Government of Alberta, new Remand Facility, $620 million. Under construction.
- Alberta Cancer Board, Cross Cancer Institute Expansion, $350 million. Proposed.
- EPCOR, new Power Plant Units (245MW) at Cloverbar Power Plant, $245 million. Under construction.

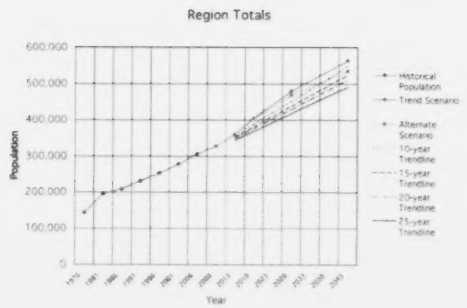
EDMONTON REGION

Historically, the Edmonton Region (Edmonton CMA plus Lamont and all of Lamont County but excluding the City of Edmonton), grew rapidly between 1976 and 1981. Since 1981, growth has been steady. Over the entire 32 year period from 1976 to 2008, the Region has grown at an average annual rate of 2.6 percent.

Population

The Edmonton Region population is projected to grow from 324,947 in 2008 to 559,161 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.6 percent over the projection period.

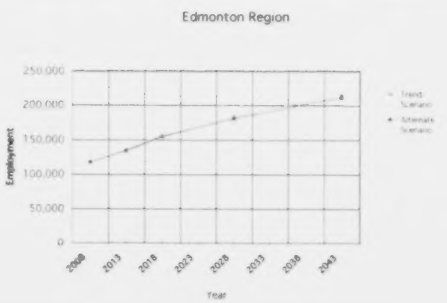
In the Alternate Scenario, the population is projected to grow from 327,363 in 2008 to 534,500 in 2043. This growth reflects an average annual change of 1.4 percent over the projection period.



Employment

Total employment is projected to grow from 116,649 in 2008 to 212,730 in 2043. This growth reflects an average annual change of 1.7 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 117,847 in 2008 to 211,629 in 2043. This growth reflects an average annual change of 1.7 percent over the projection period.



Trend Scenario

Population growth in the Trend Scenario is higher than all the trendlines, particularly during the middle of the projection period. This reflects a continuation of residential development, primarily in the urban areas within the Edmonton Region.

Employment growth outpaces population growth in the Region. In 2008, the population/ employment ratio for the Region as a whole was 2.78. This ratio decreases to 2.63 by 2043.

Alternate Scenario

Population growth in the Alternate Scenario is lower by 29,000 by 2043. This results in the total Region population dropping below the ten year trendline at the end of the projection period.

Total employment in the Region declines marginally in the Alternate Scenario. However, the rate of decline is proportionally smaller than the decline in population, giving the Region as a whole a more favorable population to employment ratio.

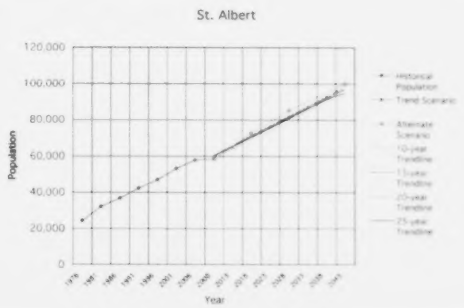
ST. ALBERT

St. Albert was incorporated as a City in 1977. Since 1976, the City has grown steadily at an average annual rate of 2.8 percent, which is above the average for the Edmonton Region (2.6 percent). St. Albert is currently Alberta's 5th largest city.

Population

St Albert's population is projected to grow from 58,501 in 2008 to 99,998 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.5 percent over the projection period.

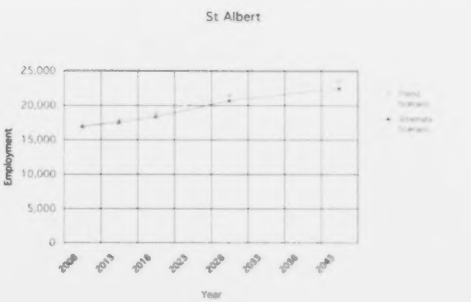
In the Alternate Scenario, the population is projected to grow from 58,501 in 2008 to 99,998 in 2043. This growth reflects an average annual change of 1.5 percent over the projection period.



Employment

Total employment is projected to grow from 16,935 in 2008 to 23,486 in 2043. This growth reflects an average annual change of 0.9 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 16,935 in 2008 to 22,486 in 2043. This growth reflects an average annual change of 0.8 percent over the projection period.



Trend Scenario

St. Albert is projected to continue to grow at a rate that is largely consistent with the historical trend analysis. Future growth is supported by the potential for job growth in the Industrial Heartland as well as the northwest and northeast industrial areas of Edmonton. Connection to these areas with completion of Anthony Henday Drive will allow for relatively modest commute times.

Employment growth is projected to be slower than population growth as St. Albert becomes a residential location for jobs elsewhere in the Region.

Alternate Scenario

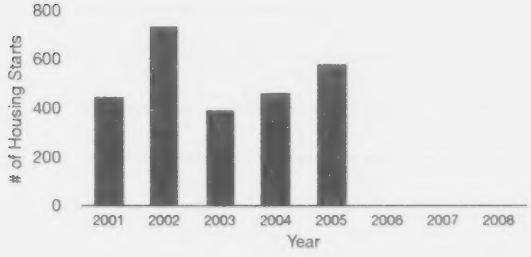
The Alternate Scenario population projection for St. Albert is the same as that for the Trend Scenario. In the Trend Scenario, St. Albert growth is supported by LRT extension to Anthony Henday Drive. In addition, in this scenario, the number of communities north of Edmonton that are assumed to have population growth associated with the jobs created in the Industrial Heartland is reduced, thus concentrating population in other communities such as St. Albert.

Total employment in St. Albert is projected to decline marginally in this Scenario relative to as growth centres elsewhere in the Region.

City of St. Albert Planning Documents Used to Guide Population / Employment Projections include:

- Municipal Census 2005, Age Composition by Neighborhood (2005)
- Municipal Census 2005, Population by Neighborhood (2005)
- Municipal Census 2005, Age Composition (2005)
- Land Use Districts, Based on Schedule A to City of St. Albert Land Use Bylaw 9/2005 (December 6, 2006)
- North Ridge Area Structure Plan (August 2003)
- North Ridge Neighbourhood Profile (Spring 2004)
- Amended North Ridge St. Albert Area Structure Plan (BL22/2001, BL2/2004)
- Index Map, Area Structure Plans/Area Redevelopment Plans (July 10, 2006)
- Timberlea Area Structure Plan
- Akinsdale South Area Structure Plan Amendment.

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Residential	1	450,000,000
Infrastructure	4	118,500,000
Institutional	3	115,700,000
Agriculture & Related	1	15,000,000
Tourism/Recreation	1	10,700,000
Pipelines	1	5,000,000
Total	**11**	**$714,900,000**

Included in the major projects summarized above are the following:

- Condo Towers and Urban Village on Grandin Park Plaza Site, $450 million. Proposed.
- Citadel Village' Seniors Health Care Complex, $95 million. Under construction.
- Ray Gibbon Drive (Western Boundary Road Phase 3), $62.4 million. Proposed.
- Hole's Greenhouses relocation and expansion, $15 million. Announced.

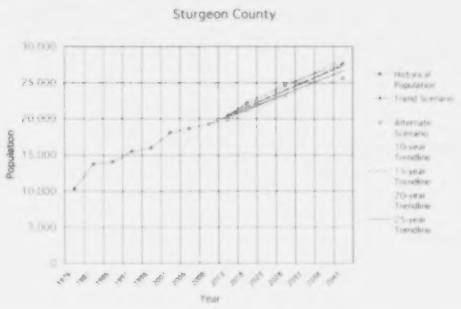
STURGEON COUNTY

Since 1976 Sturgeon County has grown steadily at an average annual rate of 2.0 percent, which is below the average for the Edmonton Region (2.6 percent).

Population

Sturgeon County's population is projected to grow from 19,204 in 2008 to 27,608 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.0 percent over the projection period.

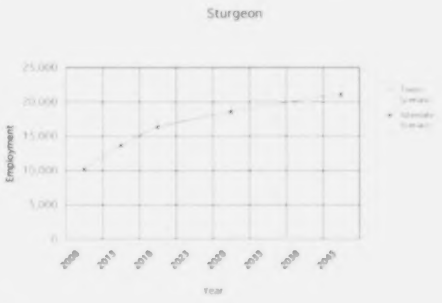
In the Alternate Scenario, the population is projected to grow from 19,204 in 2008 to 25,608 in 2043. This growth reflects an average annual change of 0.8 percent over the projection period.



Employment

Total employment is projected to grow from 10,202 in 2008 to 20,655 in 2043. This growth reflects an average annual change of 2.0 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 10,202 in 2008 to 21,155 in 2043. This growth reflects an average annual change of 2.1 percent over the projection period.



Trend Scenario

Historically, the trendline analysis results in relatively consistent projections of growth for Sturgeon. In the Trend Scenario, this growth is maintained largely due to both continued country residential development and the location of several on-site work camps at Industrial Heartland industrial sites.

Total employment increases rapidly in the short-term, largely associated with development in the Industrial Heartland.

Alternate Scenario

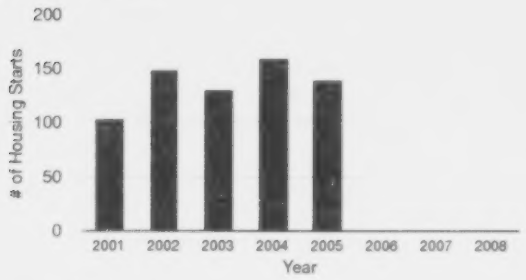
Population growth in Sturgeon is lower in the Alternate Scenario due to the likelihood of less country residential development in response to the Land Use Principles and Policies.

Total employment increases due to the concentration of employment in growth nodes in the Region.

Sturgeon County Planning Documents Used to Guide Population / Employment Projections include:

- Part 9.0 – Land Use District Maps (various dates) Source; Sturgeon County
- Alberta's Industrial Heartland Area Structure Plans

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Oil, Gas & Oilsands	3	19,500,000,000
Power	1	140,000,000
Agriculture & Related	1	90,000,000
Chemicals & Petrochemicals	1	37,000,000
Forestry & Related	1	35,000,000
Infrastructure	3	18,400,000
Total	**10**	**$19,820,400,000**

Included in the major projects summarized above are the following:

- Fort Hills Upgrader Phase 2 and 3, $12.1 billion. Proposed.
- North West Upgrading Inc. Bitumen Upgrader Phase 1, $4.2 billion. Proposed.
- North West Upgrading Inc. Bitumen Upgrader Phases 2 and 3, $3.2 billion. Proposed.
- MAXIM Power Corp. Gas Fired Electric Plant, $140 million. Proposed.
- Canadian Bioenergy Corp. Biodiesel Manufacturing Facility, $90 million. Under construction.

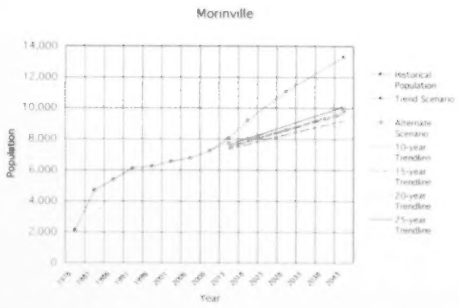
MORINVILLE

Morinville was incorporated as a Town in 1911 and has experienced a significant increase in population between 1976 and 1981. Since 1976, this growth has averaged 3.9 percent per year, which is above the average for the Edmonton Region (2.6 percent). Morinville is the centre of the Municipal District of Sturgeon and serves as the commercial centre for the surrounding district.

Population

Morinville's population is projected to grow from 7,228 in 2008 to 13,301 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.8 percent over the projection period.

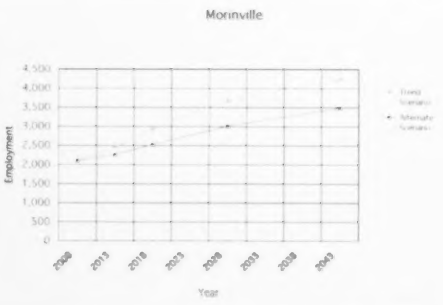
In the Alternate Scenario, the population is projected to grow from 7,228 in 2008 to 9,801 in 2043. This growth reflects an average annual change of 0.9 percent over the projection period.



Employment

Total employment is projected to grow from 2,095 in 2008 to 4,230 in 2043. This growth reflects an average annual change of 2.0 percent over the forecast period.

In the Alternate Scenario, total employment is projected to grow from 2,905 in 2008 to 3,480 in 2043. This growth reflects an average annual change of 1.5 percent over the projection period.



Trend Scenario

Population growth in Morinville is projected to increase significantly in the Trend Scenario. It is assumed that Morinville will be host to residential development associated with Industrial Heartland job creation.

Total employment in Morinville is projected to grow at a rate slightly higher than population growth. This is consistent with Morinville reaching a population threshold that will result in an increased number and variety of commercial and business opportunities.

Alternate Scenario

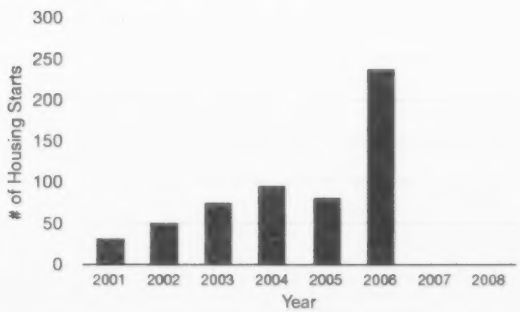
In the Alternate Scenario, population growth in Morinville is reduced in comparison with the Trend Scenario since most of the growth associated with hosting residential development associated with the Industrial Heartland is concentrated in other communities in the Region.

Employment growth in Morinville is reduced in the Alternate Scenario, in comparison to the Trend, because of the reduction in population growth.

Town of Morinville Planning Documents Used to Guide Population / Employment Projections include:

- Land Use District Map, Schedule 'A' (2006) Source; Town of Morinville
- Land Use District Map, Schedule 'A' (2007) Source; Town of Morinville
- Address Map (November 2006) Source; Town of Morinville

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Infrastructure	1	7,500,000
Total	**1**	**$7,500,000**

Included in the major projects summarized above are the following:

- Upgrade of 100 Street to 3 lanes Phase 1, $7.5 million.

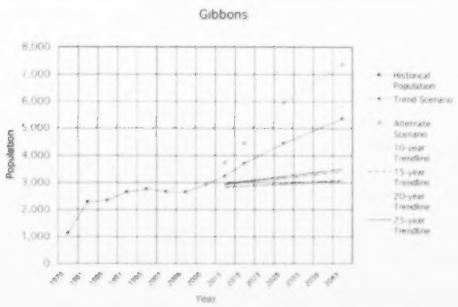
GIBBONS

Gibbons was incorporated as a Town in 1977. After a significant increase in population between 1976 and 1981, Gibbons has experienced increases and decreases in population. Since 1976, this growth has averaged 3.0 percent per year, which is above the average for the Edmonton Region (2.6 percent).

Population

Gibbon's population is projected to grow from 2,906 in 2008 to 5,348 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.8 percent over the projection period.

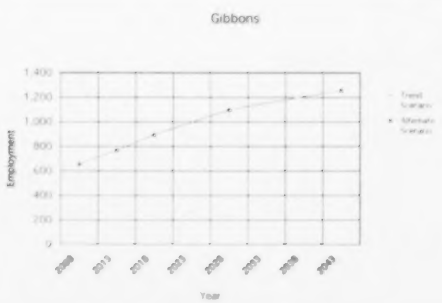
In the Alternate Scenario, the population is projected to grow from 2,906 in 2008 to 7,348 in 2043. This growth reflects an average annual change of 2.7 percent over the projection period.



Employment

Total employment is projected to grow from 654 in 2008 to 1,257 in 2043. This growth reflects an average annual change of 1.9 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 654 in 2008 to 1,257 in 2043. This growth reflects an average annual change of 1.9 percent over the projection period.



Trend Scenario

Population growth in Gibbons is projected to increase significantly in the Trend Scenario. It is assumed that Gibbons will be host to residential development associated with Industrial Heartland job creation.

Total employment in Gibbons is projected to grow at a rate slightly higher than population growth. This is consistent with Gibbons reaching a population threshold that will result in an increased number and variety of commercial and business opportunities.

Alternate Scenario

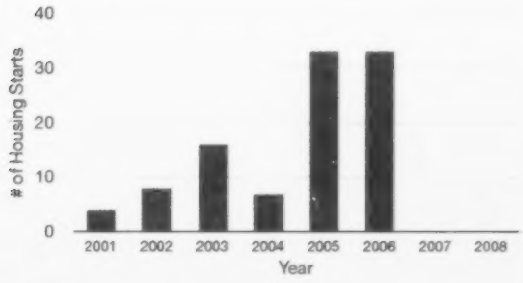
In the Alternate Scenario, population growth in Gibbons is increased significantly as it is anticipated to host some residential development associated with the Industrial Heartland job *creation.*

Employment growth in Gibbons is at the same level in the Alternate Scenario as in the Trend Scenario.

Town of Gibbons Planning Documents Used to Guide Population / Employment Projections include:

- DRAFT Future Development Concept, Municipal Development Plan.
- DRAFT Transportation System Concept, Municipal Development Plan.

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Infrastructure	1	5,200,000
Total	**1**	**$5,200,000**

Included in the major projects summarized above are the following:

- Highway 28 Project, $5.2 million. Under construction.

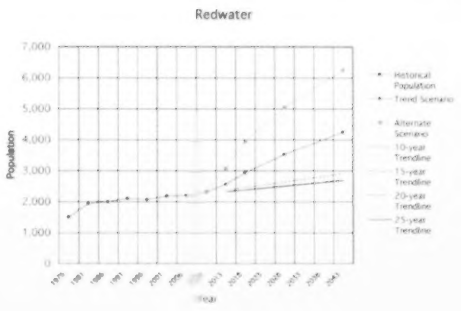
REDWATER

Redwater was incorporated as a Town in 1950. After a significant increase in population between 1976 and 1981, Redwater has experienced only modest population growth. Since 1976, this growth has averaged 1.4 percent per year, which is below the average for the Edmonton Region (2.6 percent).

Population

Redwater's population is projected to grow from 2,302 in 2008 to 4,235 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.8 percent over the projection period.

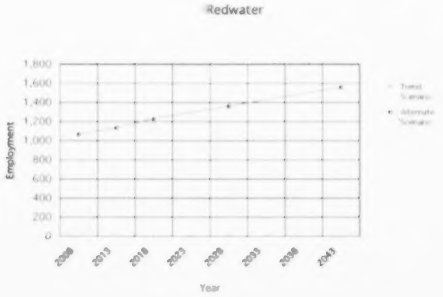
In the Alternate Scenario, the population is projected to grow from 2,302 in 2008 to 6,235 in 2043. This growth reflects an average annual change of 2.9 percent over the projection period.



Employment

Total employment is projected to grow from 1,065 in 2008 to 1,557 in 2043. This growth reflects an average annual change of 1.1 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 1,065 in 2008 to 1,557 in 2043. This growth reflects an average annual change of 1.1 percent over the projection period.



Trend Scenario

Population growth in Redwater is projected to increase significantly in the Trend Scenario. It is assumed that Redwater will be host to residential development associated with Industrial Heartland job creation.

Total employment in Redwater is projected to grow at a rate slightly higher than population growth. This is consistent with Redwater reaching a population threshold that will likely result in an increased number and variety of commercial and business opportunities.

Alternate Scenario

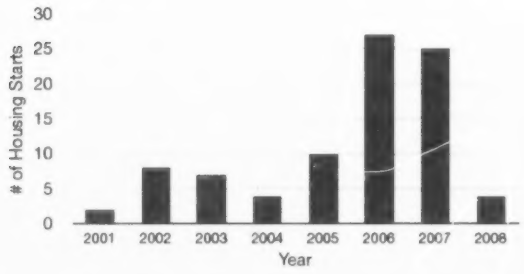
In the Alternate Scenario, population growth in Redwater is increased dramatically in comparison with the Trend Scenario. This reflects a concentration of population in selected areas of the Region, in this case due to Redwater's proximity to the Industrial Heartland.

Employment growth in Redwater is at the same level in the Alternate Scenario as in the Trend Scenario.

Town of Redwater Planning Documents Used to Guide Population / Employment Projections include:

- Land Use Bylaw, July 2006.

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Chemicals and Petrochemicals	1	200,000,000
Oilsands	1	3,200,000,000
Total	**2**	**$3,400,000,000**

Included in the major projects summarized above are the following:

- Williams Energy Co., Ethane extraction facility expansion, $200 million. Proposed.
- North West Upgrading Corp., Bitumen Upgrade Phase 2 and 3, $3.2 billion. Proposed.

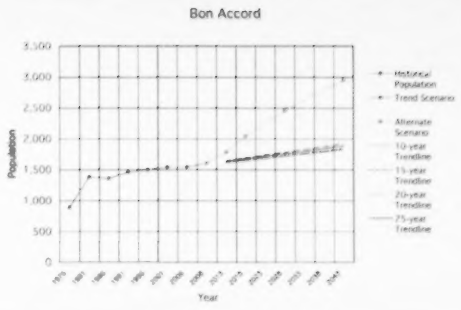
BON ACCORD

Bon Accord was incorporated as a Town in 1979. After a significant increase in population between 1976 and 1981, Bon Accord has experienced modest population growth. Since 1976, this growth has averaged 1.9 percent per year, which is below the average for the Edmonton Region (2.6 percent).

Population

Bon Accord's population is projected to grow from 1,603 in 2008 to 2,950 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.8 percent over the projection period.

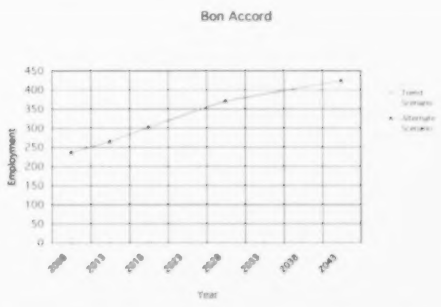
In the Alternate Scenario, the population is projected to grow from 1,603 in 2008 to 2,950 in 2043. This growth reflects an average annual change of 1.8 percent over the projection period.



Employment

Total employment is projected to grow from 236 in 2008 to 424 in 2043. This growth reflects an average annual change of 1.7 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 236 in 2008 to 424 in 2043. This growth reflects an average annual change of 1.7 percent over the projection period.



Trend Scenario

Population growth in Bon Accord is projected to increase significantly in the Trend Scenario. It is assumed that Bon Accord will be host to residential development associated with Industrial Heartland job creation.

Total employment in Bon Accord is projected to grow at a rate similar to population growth.

Alternate Scenario

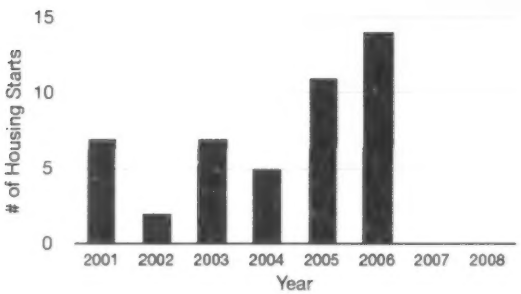
In the Alternate Scenario, population growth in Bon Accord is assumed to be the same as in the Trend Scenario. It is expected Bon Accord will be one of the communities which will have residential development associated with the Industrial Heartland growth due to its proximity to the area.

Employment growth in Bon Accord is at the same level in the Alternate Scenario as in the Trend Scenario.

Town of Bon Accord Planning Documents Used to Guide Population / Employment Projections include:

- No land use plans were provided by the municipality.

Housing Starts



Major Projects

- There are no projects identified for Bon Accord.

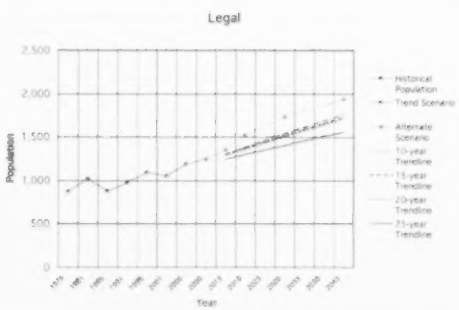
LEGAL

Legal was incorporated as a Town in 1998. Since 1976 it has experienced increases and decreases in population, averaging an increase of 1.1 percent per year, which is below the average for the Edmonton Region (2.6 percent).

Population

Legal's population is projected to grow from 1,252 in 2008 to 1,938 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.3 percent over the projection period.

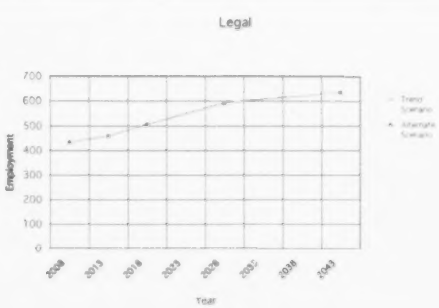
In the Alternate Scenario, the population is projected to grow from 1,252 in 2008 to 1,938 in 2043. This growth reflects an average annual change of 1.3 percent over the projection period.



Employment

Total employment is projected to grow from 434 in 2008 to 636 in 2043. This growth reflects an average annual change of 1.1 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 434 in 2008 to 636 in 2043. This growth reflects an average annual change of 1.1 percent over the projection period.



Trend Scenario

Legal is projected to experience higher than historic levels of population growth, in large part due to the growth in the Industrial Heartland. Employment growth is assumed to follow population growth.

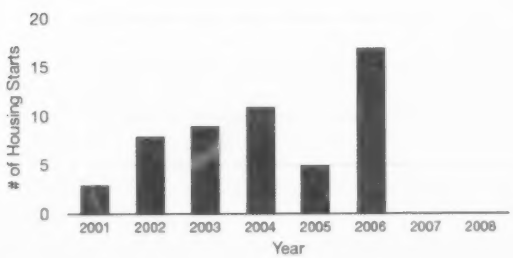
Alternate Scenario

The Alternate Scenario for Legal is assumed to be the same as the Trend. The amount of population and employment growth allocated to Legal for the Industrial Heartland was not significant enough to be affected by the application of the Land Use Principles and Policies.

Town of Legal Planning Documents Used to Guide Population / Employment Projections include:

- Town of Legal Map.
- Municipal Development Plan, 1998, and also
- Legal Crossroads Area Structure Plan, Map 1-Plan Area (March 2001). Source; Armin A. Preiksaitis & Associates Ltd.
- Legal Crossroads Area Structure Plan, Map 5-Future Development Concept (March 2001). Source: Armin A. Preiksaitis & Associates Ltd.

Housing Starts



Major Projects

- There are no major projects identified for Legal.

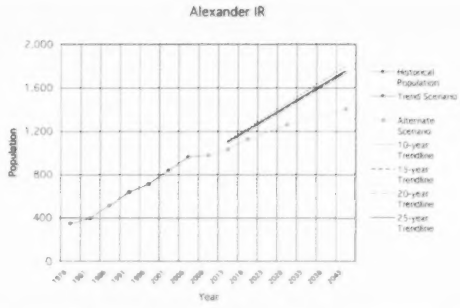
ALEXANDER 134 (INDIAN RESERVE)

Since 1976, Alexander 134 has grown steadily at an average annual rate of 3.3 percent, which is above the average for the Edmonton Region (2.6 percent).

Population

The Alexander 134 population is projected to grow from 976 in 2008 to 1,405 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.0 percent over the projection period.

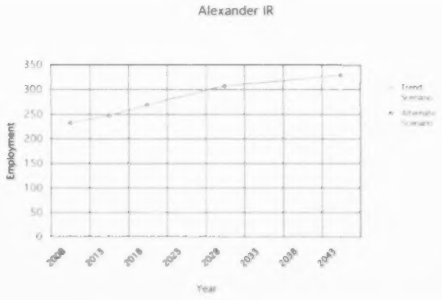
In the Alternate Scenario, the population is projected to grow from 976 in 2008 to 1,405 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.



Employment

Total employment is projected to grow from 232 in 2008 to 329 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 232 in 2008 to 329 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.



Trend / Alternate Scenario

Alexander First Nation - Alexander IR is projected to experience modest population and employment growth in each of the Trend and Alternate scenarios.

Planning Documents Used to Guide Population / Employment Projections

- No land use plans were acquired.

Housing Starts

- No housing starts data was available.

Major Projects

- There are no major projects identified.

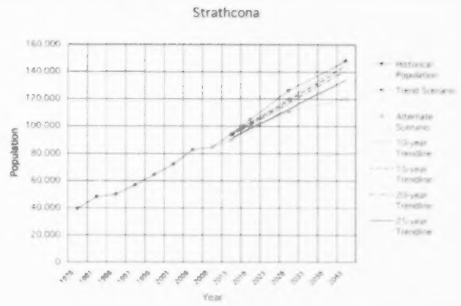
STRATHCONA COUNTY

Strathcona County was incorporated as a Specialized Municipality in 1996. Since 1976 it has grown steadily at an average annual rate of 2.4 percent, which is just below the average for the Edmonton Region (2.6 percent).

Population

Strathcona's population is projected to grow from 84,415 in 2008 to 147,891 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.6 percent over the projection period.

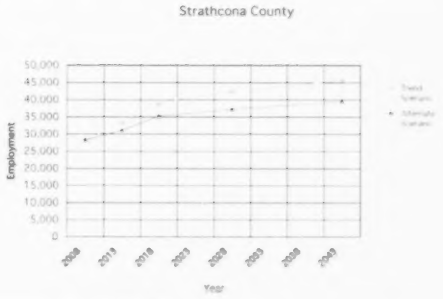
In the Alternate Scenario, the population is projected to grow from 84,415 in 2008 to 119,891 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.



Employment

Total employment is projected to grow from 28,187 in 2008 to 45,537 in 2043. This growth reflects an average annual change of 1.4 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 28,187 in 2008 to 39,537 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.



Trend Scenario

Strathcona County population growth is projected to continue just above the historical trendlines on the strength of a new urban service node northeast of Sherwood Park and the strong job growth projected for the Industrial Heartland.

Employment growth in Strathcona County is based on both its population growth as well as additional jobs from Industrial Heartland growth.

Alternate Scenario

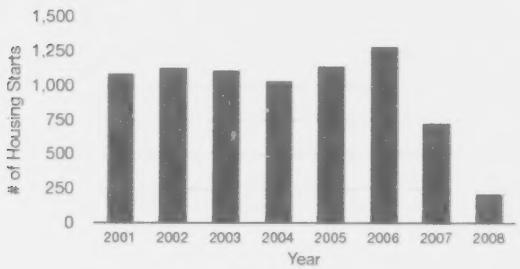
Total population growth in Strathcona County was initially reduced to reflect the application of the Land Use Principles and Policies, primarily based on protecting agricultural land and other areas having higher levels of transit. Subsequent discussion resulted in the restoration of urban population growth. The magnitude of this growth is sufficient to exceed the potential for intensification of development in the existing urban services area of Sherwood Park, necessitating the development of a new urban services node. No significant amount of the population growth in this scenario is a result of country residential development.

Because of the net decline in population growth in the Alternate Scenario, population related employment growth has been reduced commensurately.

Strathcona County Planning Documents Used to Guide Population / Employment Projections include:

- Municipal Development Plan, 2007.
- Sherwood Park 2005 Projected Population Based on the 2003 Municipal Census (2006).

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Oil, Gas & Oilsands	12	43,786,000,000
Commercial/Retail and Residential	1	400,000,000
Residential	4	268,000,000
Institutional	5	244,400,000
Infrastructure	8	228,800,000
Pipelines	2	180,000,000
Commercial/Retail	3	112,000,000
Chemicals & Petrochemicals	1	70,000,000
Power	1	5,000,000
Total	**37**	**$45,294,200,000**

Included in the major projects summarized above are the following:

- Shell Canada Energy, Scotford Upgrader 2, $22 billion. Proposed.
- Albian Sands Energy Ltd., Scotford Upgrader Expansion, $5.6 billion. Under construction.
- Total E&P Canada Ltd., Bitumen Upgrader: Phase 1, $6 billion. Announced.

FORT SASKATCHEWAN

Fort Saskatchewan was incorporated as a City in 1985. After a significant increase in population between 1976 and 1981, Fort Saskatchewan has experienced slower population growth until 2006. Since 1976, this growth has averaged 2.3 percent per year, which is above the average for the Edmonton Region (2.6 percent).

Population

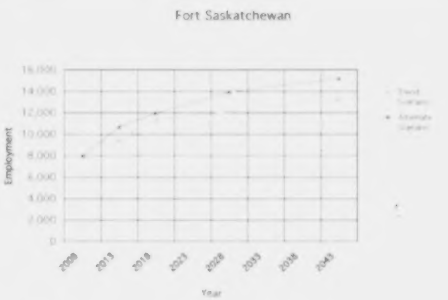
Fort Saskatchewan's population is projected to grow from 17,243 in 2008 to 38,413 in 2043 in the Trend Scenario. This growth reflects an average annual change of 2.3 percent over the projection period.

In the Alternate Scenario, the population is projected to grow from 17,243 in 2008 to 41,913 in 2043. This growth reflects an average annual change of 2.6 percent over the projection period.

Employment

Total employment is projected to grow from 7,959 in 2008 to 13,169 in 2043. This growth reflects an average annual change of 1.4 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 7,959 in 2008 to 15,169 in 2043. This growth reflects an average annual change of 1.9 percent over the projection period.



Trend Scenario

Fort Saskatchewan is expected to grow significantly in the Trend Scenario due to its proximity to all areas of the Industrial Heartland and the City of Edmonton. This growth is significantly above all historic trendlines.

Fort Saskatchewan's employment will grow due in part to its population growth and in part due to its hosting development related to growth in the Industrial Heartland.

Alternate Scenario

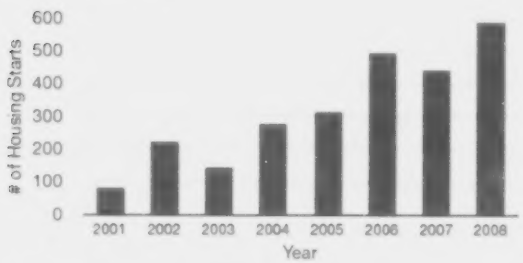
In the Alternate Scenario, Fort Saskatchewan is projected to grow more quickly than the Trend Scenario. This is a result of the Land Use Principles and Policies focussing residential development in selected urban municipalities which act more as Regional centres with enhanced community services. Fort Saskatchewan's proximity to industrial growth in the Region makes it a prime candidate to accommodate this increased population growth.

Employment in Fort Saskatchewan increases in the Alternate Scenario in comparison to the Trend Scenario largely due to increased population growth.

Fort Saskatchewan Planning Documents Used to Guide Population / Employment Projections include:

- Municipal Development Plan, amended (2008).
- Municipal Development Plan 1999-2010, Map 2 Future Land Use Concept (July 11, 2006).
- Fort Saskatchewan 2005 Municipal Census, Table 3: Demographic Composition of the Total Population by Age and Gender.
- Land Use District Map, Fort Saskatchewan Land Use Bylaw (May 2008).

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Mining	1	250,000,000
Chemicals & Petrochemicals	1	100,000,000
Institutional	3	95,400,000
Residential	4	78,700,000
Infrastructure	3	47,000,000
Oil, Gas & Oilsands	1	18,000,000
Commercial/Retail	1	8,000,000
Total	**14**	**$597,100,000**

Included in the major projects summarized above are the following:

- Sherritt International Facility, Expansion Phase 1 and 2, $250 million. Under construction.
- Williams Energy Co., Ethane extraction facility expansion, $200 million. Proposed.
- Fort Saskatchewan Community Hospital, $48 million. Under construction.

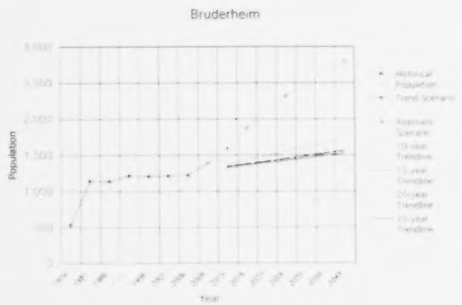
BRUDERHEIM

Bruderheim was incorporated as a Town in 1980. After a significant increase in population between 1976 and 1981, Bruderheim has no appreciable growth in population. Since 1976, this growth has averaged 3.1 percent per year, which is above the average for the Edmonton Region (2.6 percent).

Population

Bruderheim's population is projected to grow from 1,385 in 2008 to 2,783 in 2043 in the Trend Scenario. This growth reflects an average annual change of 2.0 percent over the projection period.

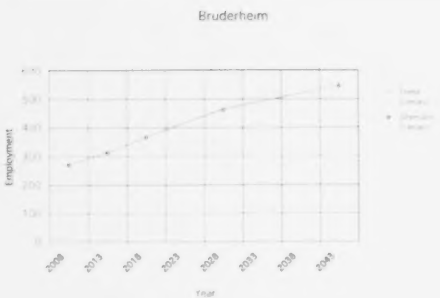
In the Alternate Scenario, the population is projected to grow from 1,385 in 2008 to 2,783 in 2043. This growth reflects an average annual change of 2.0 percent over the projection period.



Employment

Total employment is projected to grow from 270 in 2008 to 546 in 2043. This growth reflects an average annual change of 2.0 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 270 in 2008 to in 546 2043. This growth reflects an average annual change of 2.0 percent over the projection period.



Trend Scenario

Population growth in Bruderheim is projected to increase significantly in the Trend Scenario. It is assumed that Bruderheim will be host to residential development associated with Industrial Heartland job creation.

Total employment in Bruderheim is projected to grow at a rate similar to population growth.

Alternate Scenario

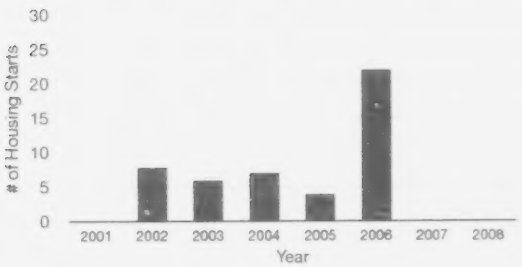
In the Alternate Scenario, population growth in Bruderheim is assumed to be the same as in the Trend Scenario. It is expected Bruderheim will be one of the communities that will host residential development associated with Industrial Heartland growth.

Employment growth in Bruderheim is held at the same level in the Alternate Scenario as in the Trend Scenario.

Town of Bruderheim Planning Documents Used to Guide Population / Employment Projections include:

- Municipal Development Plan, Map 2: Long Term Land Use Concept (January 30, 2007).

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Residential	1	6,000,000
Total	**1**	**$6,000,000**

Included in the major projects summarized above are the following:

- Monolithic Domes Canada (60 dome units), $60 million. Proposed.

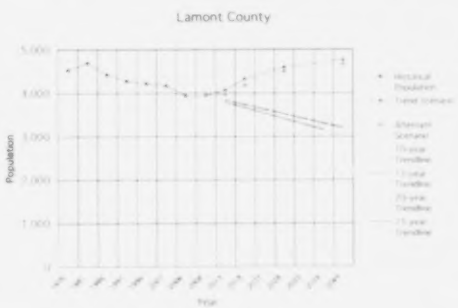
LAMONT COUNTY

Lamont County was incorporated as a County in 2000. Since 1981 the county's population has steadily declined at an average annual rate of 0.4 percent.

Population

Lamont County's population is projected to grow from 3,937 in 2008 to 4,761 in 2043 in the Trend Scenario. This growth reflects an average annual change of 0.5 percent over the projection period.

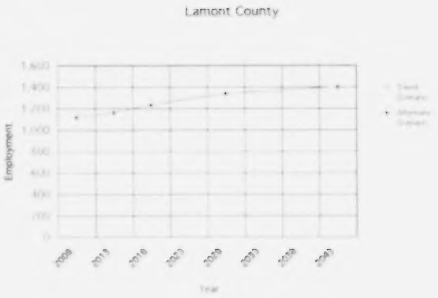
In the Alternate Scenario, the population is projected to grow from 3,937 in 2008 to 4,661 in 2043. This growth reflects an average annual change of 0.5 percent over the projection period.



Employment

Total employment is projected to grow from 1,118 in 2008 to 1,399 in 2043. This growth reflects an average annual change of 0.6 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 1,118 in 2008 to 1,399 in 2043. This growth reflects an average annual change of 0.6 percent over the projection period.



Trend Scenario

Population growth in Lamont County is projected to increase modestly in the Trend Scenario. It is assumed that Lamont County will be host to some residential development associated with Industrial Heartland job creation.

Total employment in Lamont County is projected to grow at a rate similar to population growth.

Alternate Scenario

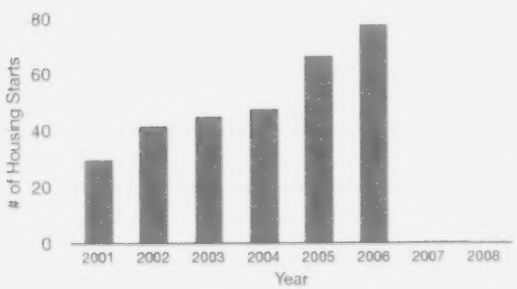
In the Alternate Scenario, population growth in Lamont County is assumed to be just slightly below the Trend Scenario. This is a minor reduction in the growth associated with country residential development resulting from the application of the Land Use Principles and Policies.

Employment growth in Lamont County is held at the same level in the Alternate Scenario as in the Trend Scenario.

Lamont County Planning Documents Used to Guide Population / Employment Projections include:

- No land use plans were provided by the municipality.

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Chemicals & Petrochemicals	1	35,000,000
Total	**1**	**$35,000,000**

Included in the major projects summarized above are the following:

- Alberta Sulphur Terminal, Forming and Shipping Facility, $35 million. Proposed.

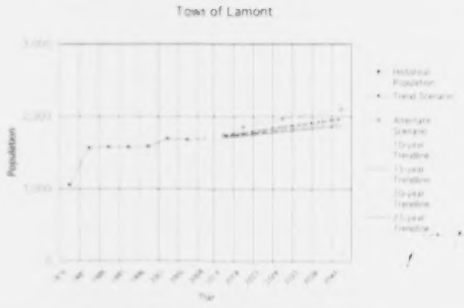
LAMONT

The Town of Lamont was incorporated as a Town in 2000. After a significant increase in population between 1976 and 1981, Lamont has experienced modest population growth. Since 1976, this growth has averaged 1.5 percent per year, which is below the average for the Edmonton Region (2.6 percent).

Population

The Town of Lamont's population is projected to grow from 1,689 in 2008 to 2,094 in 2043 in the Trend Scenario. This growth reflects an average annual change of 0.6 percent over the projection period.

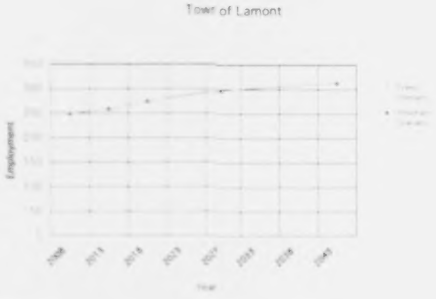
In the Alternate Scenario, the population is projected to grow from 1,689 in 2008 to 2,094 in 2043. This growth reflects an average annual change of 0.6 percent over the projection period.



Employment

Total employment is projected to grow from 248 in 2008 to 312 in 2043. This growth reflects an average annual change of 0.7 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 248 in 2008 to 312 in 2043. This growth reflects an average annual change of 0.7 percent over the projection period.



Trend Scenario

Lamont is projected to experience slightly higher than historic levels of population growth, in large part due to growth in the Industrial Heartland. Employment growth is assumed to follow population growth.

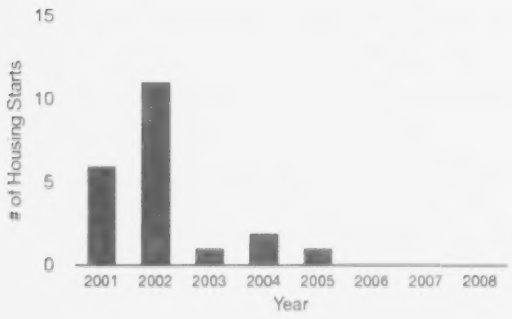
Alternate Scenario

The Alternate Scenario for Lamont is assumed to be the same as in the Trend Scenario. The amount of population and employment growth allocated to Lamont for the Industrial Heartland was not significant enough to be affected by the application of the Land Use Principles and Policies.

Town of Lamont Planning Documents Used to Guide Population / Employment Projections include:

- No land use plans were provided by the municipality.

Housing Starts



Major Projects

- There are no major projects identified for the Town of Lamont.

LEDUC

The City of Leduc was incorporated as a City in 1983. After a significant increase in population between 1976 and 1981, the City of Leduc has experienced modest population growth. Since 1976, this growth has averaged 2.8 percent per year, which is above the average for the Edmonton Region (2.6 percent).

Population

Leduc's population is projected to grow from 20,529 in 2008 to 31,795 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.3 percent over the projection period.

In the Alternate Scenario, the population is projected to grow from 20,529 in 2008 to 43,795 in 2043. This growth reflects an average annual change of 2.2 percent over the projection period.

Employment

Total employment is projected to grow from 6,991 in 2008 to 10,664 in 2043. This growth reflects an average annual change of 1.2 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 6,991 in 2008 to 11,314 in 2043. This growth reflects an average annual change of 1.4 percent over the projection period.

Trend Scenario

The City of Leduc is expected to experience population growth in the short and medium term similar to that of the past ten years. This growth will be driven by employment growth in the sub-Region at Edmonton International Airport, Port Alberta and Nisku.

Employment growth in the City is expected to grow with the population and to benefit from spin-off development associated with development at Edmonton International Airport and Port Alberta.

Alternate Scenario

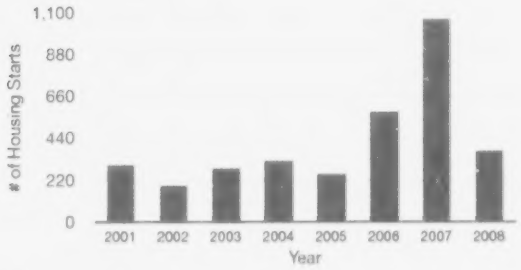
In the Alternate Scenario, population growth is concentrated in transit-supported growth corridors and the City of Leduc is a beneficiary of this growth. Population growth is expected to be significantly higher in the Alternate Scenario as the City will be home to a greater proportion of workers at Edmonton International Airport, Port Alberta and Nisku.

It is projected that there will be a modest increase in employment associated with the increase in population growth in the Alternate Scenario compared to the Trend Scenario because much of the employment growth is located outside municipal boundaries.

City of Leduc Planning Documents Used to Guide Population / Employment Projections include:

- Map 1: Percentage of Population in Planning Area (October 28, 2003).
- Map 2: Percentage of Employment in Planning Area (October 28, 2003).
- The Future Land Use Plan, Map 3 – Future Land Use (July 2006).
- The Growth Sectors, Map 4 – Residential Development Areas (August 2005).
- The Growth Sectors, Page 32, Residential Neighborhood Development Statistics (December 2005).
- Deer Valley ASP Amendment (2008).
- Leduc City & the County of Leduc, Joint Sustainability Study

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Tourism/Recreation	1	47,500,000
Residential	1	35,000,000
Commercial/Retail	1	12,000,000
Institutional	1	12,000,000
Total	**4**	**$106,500,000**

Included in the major projects summarized above are the following:

- Enhanced Recreation Facility, $47.5 million. Under construction.
- Urbia Developments Condominium Complex, $35 million. Proposed.
- Shivam Developments Office and Warehouse Building, $12 million. Proposed.
- Capital Health Authority Assisted Living Development, $12 million. Announced.

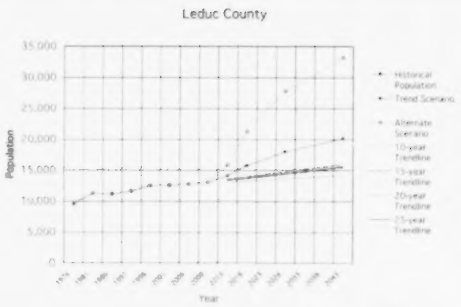
LEDUC COUNTY

After a significant population increase between 1976 and 1981, Leduc County has grown at a moderate rate. Since 1976, the average annual rate of growth has been 1.0 percent, which is below the average for the Edmonton Region (2.6 percent).

Population

Leduc County's population is projected to grow from 12,985 in 2008 to 20,110 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.3 percent over the projection period.

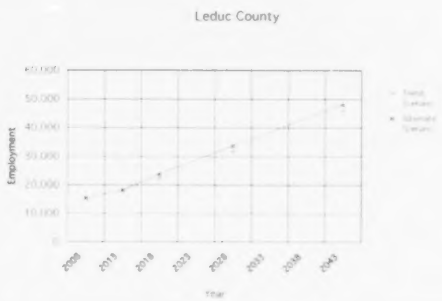
In the Alternate Scenario, the population is projected to grow from 12,985 in 2008 to 33,110 in 2043. This growth reflects an average annual change of 2.7 percent over the projection period.



Employment

Total employment is projected to grow from 15,335 in 2008 to 45,955 in 2043. This growth reflects an average annual change of 3.2 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 15,335 in 2008 to 48,155 in 2043. This growth reflects an average annual change of 3.3 percent over the projection period.



Trend Scenario

Population growth in the Leduc County is above the historical trendlines consistent with the significant increase in employment opportunities in the sub-Region. The creation of new urban types of residential development in the County will help facilitate this growth.

Employment growth is substantive as it includes the projected development at Edmonton International Airport associated with Port Alberta and the continued industrial and commercial development west of Nisku.

Alternate Scenario

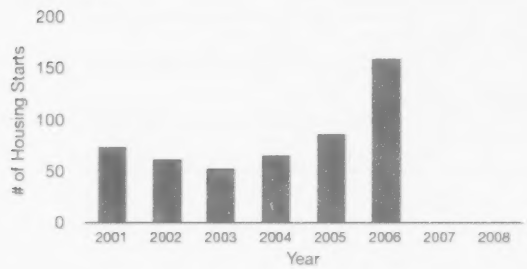
In the Alternate Scenario, population growth is concentrated in transit-supported growth corridors and Leduc County (similar to the City of Leduc) is a beneficiary of this growth. Population growth is expected to be significantly higher in the Alternate Scenario as the County will be home to a greater proportion of workers at Edmonton International Airport, Port Alberta and Nisku. This additional population growth is offset to some degree by reduced country residential development.

It is projected that there will be a modest increase in employment associated with the increase in population growth in the Alternate Scenario as compared to that in the Trend Scenario. The employment growth in this scenario is not commensurate with the population growth, as most of the related commercial and business activity associated with the population growth has been accounted for in the Trend Scenario.

Leduc County Planning Documents Used to Guide Population / Employment Projections includes:

- North Area Structure Plan.
- Preliminary South Edmonton Regional Network, Queen Elizabeth II Highway – Nisku to Ellerslie (January 2007).
- Municipal Development Plan, Land Use Concept Map 2 (October 1999).
- Port Alberta Comprehensive Commercial Real Estate Plan Study Area, Edmonton International Airport (November 2006). Source; Edmonton Airports
- Blackmud Creek Area Structure Plan, (January 2004).
- Regional Context Plan, QE II Business Park Area Structure Plan (August 2006).
- Blackmud Creek Plan (February 2004).
- UMA/AECOM Report, Nisku Industrial Development (December 2007).
- Saunders Lake Area Structure Plan (August 1995).
- Preliminary Exhibit 6: 42,000 Population Horizon Estimated 2088, Highway 2/2A Interchange, Leduc Functional Planning Study (December 2006).
- Municipal Development Plan, (October 2004).

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Infrastructure	4	1,194,100,000
Total	**4**	**$1,194,100,000**

Included in the major projects summarized above are the following:

- Edmonton Regional Airport Authority, Expansion, $1.1 billion. Announced.
- Highway 625 Reconstruction, $26 million. Announced.

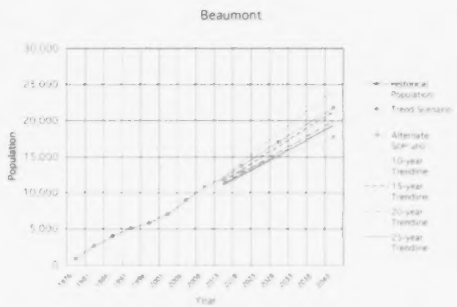
BEAUMONT

Beaumont was incorporated as a Town in 1980. Since 1976 it has grown steadily at an average annual rate of 8.3 percent, which is above the average for the Edmonton Region (2.6 percent).

Population

Beaumont's population is projected to grow from 10,820 in 2008 to 21,752 in 2043 in the Trend Scenario. This growth reflects an average annual change of 2.0 percent over the projection period.

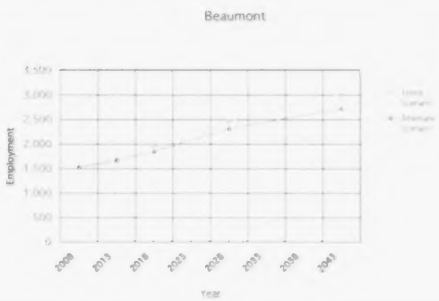
In the Alternate Scenario, the population is projected to grow from 10,820 in 2008 to 17,752 in 2043. This growth reflects an average annual change of 1.4 percent over the projection period.



Employment

Total employment is projected to grow from 1,527 in 2008 to 3,023 in 2043. This growth reflects an average annual change of 2.0 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 1,527 in 2008 to 2,723 in 2043. This growth reflects an average annual change of 1.7 percent over the projection period.



Trend Scenario

Historically, Beaumont has demonstrated consistent growth over the period since 1976. In the Trend Scenario, this growth is expected to continue. Beaumont's population growth will be supported by economic growth in Leduc County at Edmonton International Airport, Port Alberta and Nisku.

Employment growth in Beaumont is projected to keep pace with population growth.

Alternate Scenario

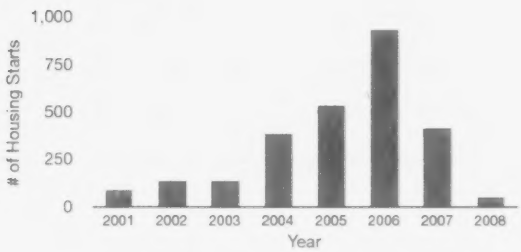
In the Alternate Scenario, population growth is concentrated in several communities in the Region in close proximity to employment growth within major transit corridors, consistent with the Land Use Principles and Policies. As a result, Beaumont's population growth is significantly reduced from that projected for the Trend Scenario.

Similarly, employment growth is reduced to reflect the adjustment to the Town's population.

Town of Beaumont Planning Documents Used to Guide Population / Employment Projections include:

- Municipal Development Plan, Map 5.1-Future Land Use Concept (February 2006).

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Tourism/Recreation	2	21,800,000
Institutional	1	6,400,000
Total	**3**	**$28,200,000**

Included in the major projects summarized above are the following:

- S&D International Group, Aquatic and Fitness Complex, $14.8 million. Under construction.
- Leduc Foundation Affordable Housing Project, $7 million. Under construction.
- Place Beasejour' Supporting Living Units, $6.4 million. Announced.

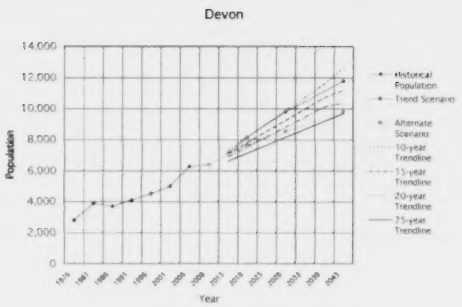
DEVON

Devon was incorporated as a Town in 1950. Devon experienced a significant population increase between 1976 and 1981, with a slight decline in 1986. Since 1986 population growth has been fairly steady with a stronger increase in 2006. Overall, since 1976 Devon has grown at an average annual rate of 2.6 percent, which is the same as the average for the Edmonton Region (2.6 percent).

Population

Devon's population is projected to grow from 6,400 in 2008 to 11,777 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.8 percent over the projection period.

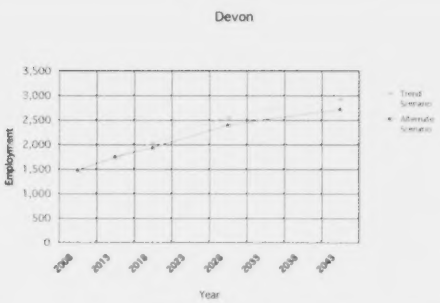
In the Alternate Scenario, the population is projected to grow from 6,400 in 2008 to 9,777 in 2043. This growth reflects an average annual change of 1.2 percent over the projection period.



Employment

Total employment is projected to grow from 1,477 in 2008 to 2,923 in 2043. This growth reflects an average annual change of 2.0 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 1,477 in 2008 to 2,723 in 2043. This growth reflects an average annual change of 1.8 percent over the projection period.



Trend Scenario

Population growth in Devon has been sporadic since 1976. In the Trend Scenario, it has been assumed that Devon will host residential development associated with employment growth at Edmonton International Airport, Port Alberta and Nisku. This means growth will be above the longer term and higher population growth trendlines.

Employment growth in Devon is projected to keep pace with population growth.

Alternate Scenario

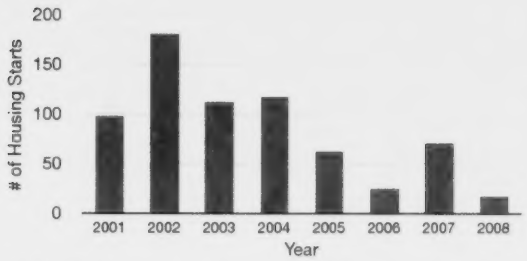
In the Alternate Scenario, population growth is concentrated in several communities in the Region in close proximity to employment growth, consistent with the Land Use Principles and Policies. As a result, Devon's population growth is reduced from that projected for the Trend Scenario.

Devon's employment in the Alternate Scenario is marginally less than in the Trend Scenario to reflect the reduced population.

Town of Devon Planning Documents Used to Guide Population / Employment Projections include:

- Land Use Districts Map (August 2006).

Housing Starts



Major Projects

- There are no major projects identified for the Town of Devon.

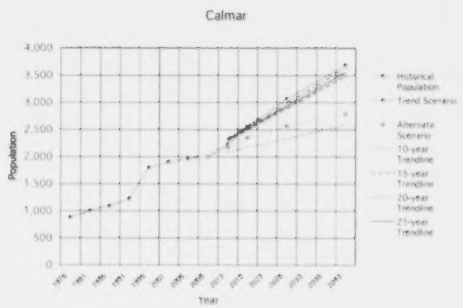
CALMAR

Calmar was incorporated as a Town in 1954. Between 1976 and 1991 Calmar grew at a steady rate. It experienced a significant increase in population in 1996 and then returned to more moderate growth over the rest of the historical period. Since 1976, Calmar has grown at an average annual rate of 2.7 percent, which is just above the average for the Edmonton Region (2.6 percent).

Population

Calmar's population is projected to grow from 2,004 in 2008 to 3,688 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.8 percent over the projection period.

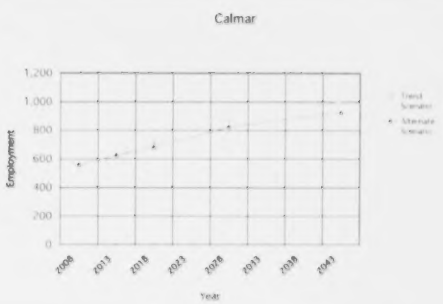
In the Alternate Scenario, the population is projected to grow from 2,004 in 2008 to 2,788 in 2043. This growth reflects an average annual change of 0.9 percent over the projection period.



Employment

Total employment is projected to grow from 558 in 2008 to 1,002 in 2043. This growth reflects an average annual change of 1.7 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 558 in 2008 to 927 in 2043. This growth reflects an average annual change of 1.5 percent over the projection period.



Trend Scenario

Historically, Calmar has demonstrated consistent growth over the period since 1976. In the Trend Scenario this growth is expected to continue. Similar to Beaumont, Calmar's population growth will be supported by economic growth in Leduc County at Edmonton International Airport, Port Alberta and Nisku.

Employment growth in Calmar is projected to keep pace with population growth.

Alternate Scenario

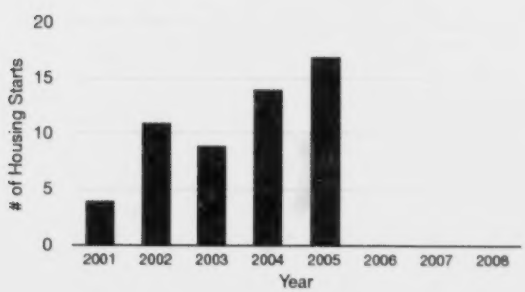
In the Alternate Scenario, population growth is concentrated in several communities in the Region in close proximity to employment growth, consistent with the Land Use Principles and Policies. As a result, Calmar's population growth is reduced from that projected for the Trend Scenario.

Similarly, employment growth is reduced to reflect the adjustment to the Town's population.

Town of Calmar Planning Documents Used to Guide Population / Employment Projections include:

- Land Use District Map (May, 2007).
- Thomas Creek Area Structure Plan, Amendment.

Housing Starts



Major Projects

- There are no major projects identified for the Town of Calmar.

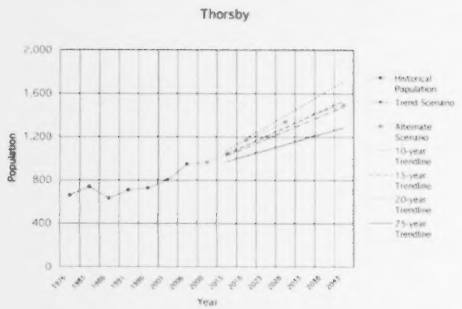
THORSBY

Thorsby was incorporated as a Village in 1949. Since 1976 growth has been sporadic, averaging 1.2 percent per year, which is below the average for the Edmonton Region (2.6 percent).

Population

Thorsby's population is projected to grow from 964 in 2008 to 1,493 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.3 percent over the projection period.

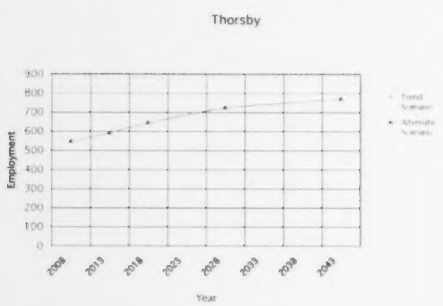
In the Alternate Scenario, the population is projected to grow from 964 in 2008 to 1,493 in 2043. This growth reflects an average annual change of 1.3 percent over the projection period.



Employment

Total employment is projected to grow from 547 in 2008 to 770 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 547 in 2008 to 770 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.



Trend Scenario

Thorsby is projected to experience growth that is largely consistent with the historical trends. Employment growth is assumed to follow population growth.

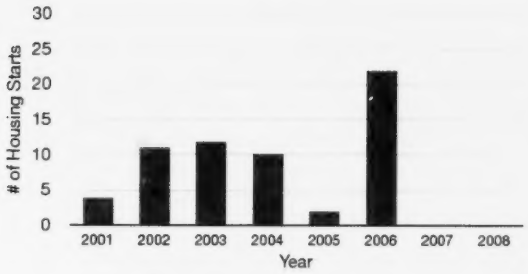
Alternate Scenario

The Alternate Scenario for Thorsby is assumed to be the same as in the Trend Scenario. The application of the Land Use Principles and Policies is not expected to have a substantive impact on growth in Thorsby.

Village of Thorsby Planning Documents Used to Guide Population / Employment Projections include:

- Village of Thorsby Land Use Bylaw 2000-05, Schedule C: Land Use Districts (January 2005).

Housing Starts



Major Projects

- There are no major projects identified for the Village of Thorsby.

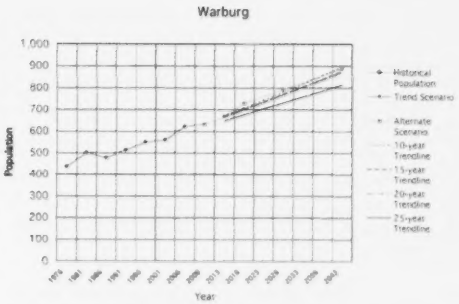
WARBURG

Warburg was incorporated as a Village in 1953. Since 1976 growth has been sporadic, averaging 1.2 percent per year, which is below the average for the Edmonton Region (2.6 percent).

Population

Warburg's population is projected to grow from 632 in 2008 to 887 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.0 percent over the projection period.

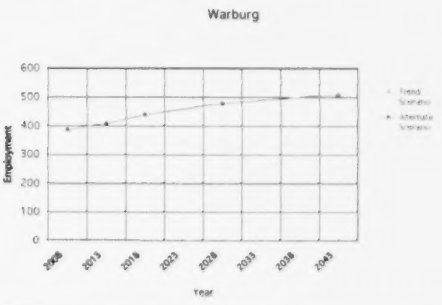
In the Alternate Scenario, the population is projected to grow from 632 in 2008 to 887 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.



Employment

Total employment is projected to grow from 387 in 2008 to 509 in 2043. This growth reflects an average annual change of 0.8 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 387 in 2008 to 509 in 2043. This growth reflects an average annual change of 0.8 percent over the projection period.



Trend Scenario

Warburg is projected to experience growth that is largely consistent with the historical trends. Employment growth is assumed to follow population growth.

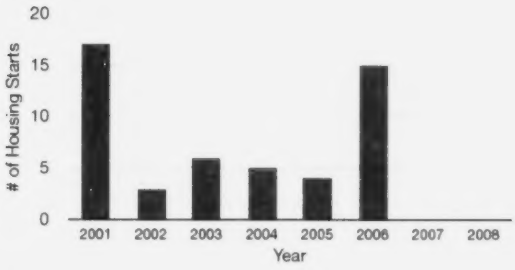
Alternate Scenario

The Alternate Scenario for Warburg is assumed to be the same as in the Trend Scenario. The application of the Land Use Principles and Policies is not expected to have a substantive impact on growth in Warburg.

Village of Warburg Planning Documents Used to Guide Population / Employment Projections includes:

- No land use plans were provided by the municipality.

Housing Starts



Major Projects

- There are no major projects identified for the Village of Warburg.

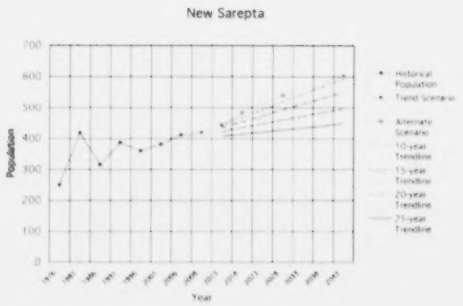
NEW SAREPTA

New Sarepta was incorporated as a Village in 1960. Since 1976 growth has been sporadic, averaging 1.6 percent per year, which is below the average for the Edmonton Region (2.6 percent).

Population

New Sarepta's population is projected to grow from 417 in 2008 to 600 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.0 percent over the projection period.

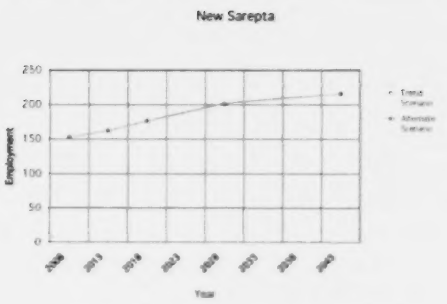
In the Alternate Scenario, the population is projected to grow from 417 in 2008 to 600 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.



Employment

Total employment is projected to grow from 152 in 2008 to 216 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 152 in 2008 to 216 in 2043. This growth reflects an average annual change of 1.0 percent over the projection period.



Trend Scenario

New Sarepta is projected to experience growth that is largely consistent with the historical trends. Employment growth is assumed to follow population growth.

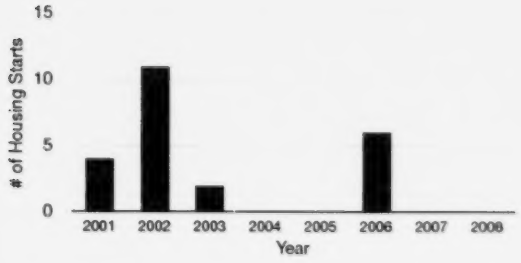
Alternate Scenario

The Alternate Scenario for New Sarepta is assumed to be the same as in the Trend Scenario. The application of the Land Use Principles and Policies is not expected to have a substantive impact on growth in New Sarepta.

Village of New Sarepta Planning Documents Used to Guide Population / Employment Projections include:

- No land use plans were provided by the municipality.

Housing Starts



Major Projects

- There are no major projects identified for the Village of New Sarepta.

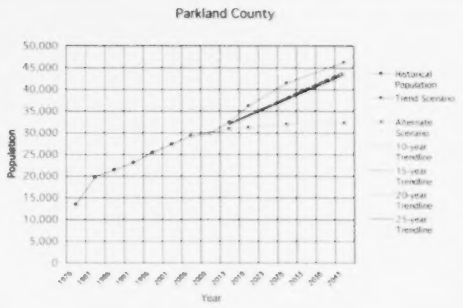
PARKLAND COUNTY

Following a significant increase in population between 1976 and 1981, Parkland County has grown steadily. Since 1976 this growth has averaged 2.5 percent per year, which is just below the average for the Edmonton Region (2.6 percent).

Population

Parkland County's population is projected to grow from 29,850 in 2008 to 46,231 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.3 percent over the projection period.

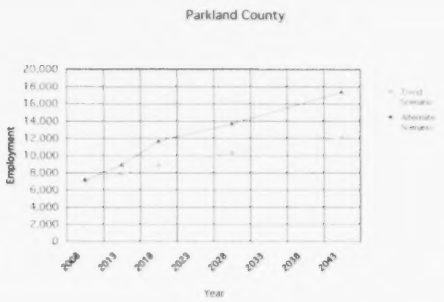
In the Alternate Scenario, the population is projected to grow from 29,850 in 2008 to 32,231 in 2043. This growth reflects an average annual change of 0.2 percent over the projection period.



Employment

Total employment is projected to grow from 7,106 in 2008 to 12,072 in 2043. This growth reflects an average annual change of 1.5 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 7,106 in 2008 to 17,347 in 2043. This growth reflects an average annual change of 2.6 percent over the projection period.



Trend Scenario

In the Trend Scenario Parkland County is projected to experience significant population growth, slightly in excess of the historical trendline. This growth is supported by industrial growth in the Acheson Industrial Park, Edmonton and by development of additional power plant operations in the County.

Total employment is also projected to increase as industrial development occurs in Acheson and other areas within proximity to the proposed outer ring road.

Alternate Scenario

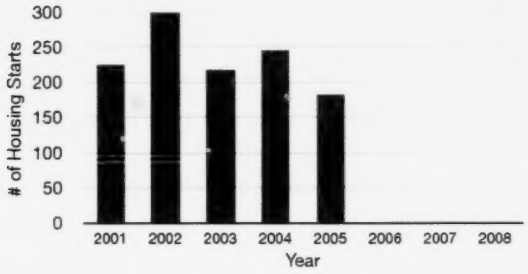
In the Alternate Scenario, population growth in Parkland County is reduced as application of the Land Use Principles and Policies leads to less country residential development.

Employment in Parkland is projected to increase in the Alternate Scenario due to an increased concentration of jobs in the Acheson employment area.

Parkland County Planning Documents Used to Guide Population / Employment Projections include:

- Land Use Concept Map, Map 2 as amended by Bylaw No. 30-00 (1998).
- Land Use Bylaw 15-00, Map 5.1Part Five (January 2007).
- Municipal Development Plan (September 2007).

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Power	2	1,633,000,000
Total	**3**	**$1,633,000,000**

Included in the major projects summarized above are the following:

- TransAlta Corporation, Keephills 3 Power Project, $1.6 billion. Under construction.

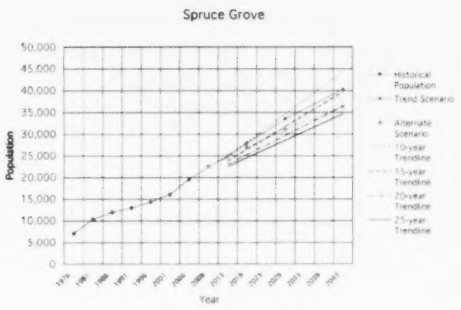
SPRUCE GROVE

Spruce Grove was incorporated as a City in 1986. Since 1976 it has grown steadily at an average annual rate of 3.7 percent, which is above the average for the Edmonton Region (2.6 percent).

Population

Spruce Grove's population is projected to grow from 22,380 in 2008 to 40,191 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.7 percent over the projection period.

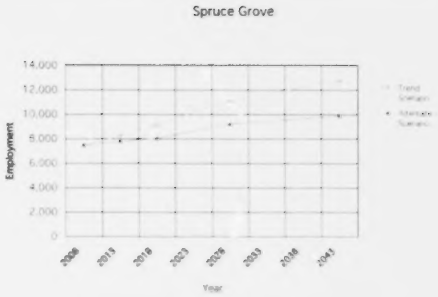
In the Alternate Scenario, the population is projected to grow from 22,380 in 2008 to 36,191 in 2043. This growth reflects an average annual change of 1.4 percent over the projection period.



Employment

Total employment is projected to grow from 6,242 in 2008 to 10,608 in 2043. This growth reflects an average annual change of 1.5 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 7,440 in 2008 to 9,857 in 2043. This growth reflects an average annual change of 0.8 percent over the projection period.



Trend Scenario

Population growth in the Trend Scenario is projected to be near the high end of the trendline analysis. This is supported by sub-Regional job growth and increased mobility in the Region due to development of the outer ring road.

Employment growth is projected to be roughly commensurate with population growth.

Alternate Scenario

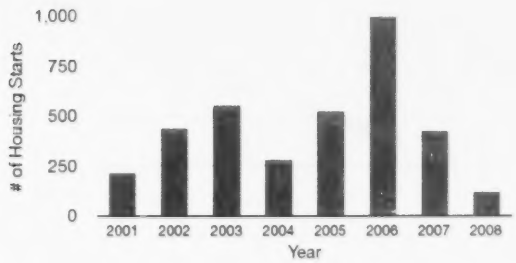
In the Alternate Scenario, Spruce Grove's population growth is projected to be lower than in the Trend Scenario due to the concentration of residential development in communities with proximity to major employment areas in the Region.

Spruce Grove's employment in the Alternate Scenario is less than the Trend Scenario due to reduced population and jobs being more likely to locate in the Acheson area, rather than in the City.

Spruce Grove Planning Documents Used to Guide Population / Employment Projections include:

- 2005 Census Enumeration Area Map.
- Spruce Grove Map (2007).
- City of Spruce Grove, Planning and Infrastructure Land Use Plan (January 2007).
- Municipal Development Plan Bylaw, Amendment (November 2007).

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Residential	1	30,000,000
Tourism/Recreation	2	17,000,000
Total	**3**	**$47,000,000**

Included in the major projects summarized above are the following:

- "Kingstreet on the Park" Condominium Building, $30 million. Under construction.
- West District Park Development Phase 1, $12 million. Completed.
- Arena upgrades, $5 million. Proposed.

STONY PLAIN

Stony Plain was incorporated as a Town in 1908. Since 1976 it has grown steadily at an average annual rate of 5.2 percent, which is double the average for the Edmonton Region (2.6 percent).

Population

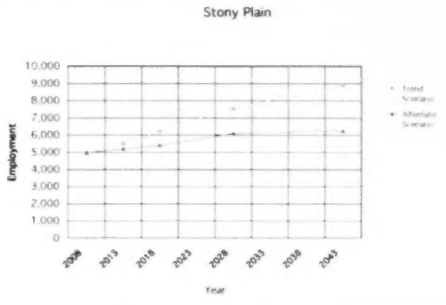
Stony Plain's population is projected to grow from 14,310 in 2008 to 27,125 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.8 percent over the projection period.

In the Alternate Scenario, the population is projected to grow from 14,310 in 2008 to 24,125 in 2043. This growth reflects an average annual change of 1.5 percent over the projection period.

Employment

Total employment is projected to grow from 4,947 in 2008 to 8,874 in 2043. This growth reflects an average annual change of 1.7 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 4,947 in 2008 to 6,224 in 2043. This growth reflects an average annual change of 0.7 percent over the projection period.



Trend Scenario

Population growth in the Trend Scenario is projected to be near the high end of the trendline analysis. This is supported by sub-Regional job growth and increased mobility in the Region due to development of the outer ring road.

Employment growth is projected to be roughly commensurate with population growth.

Alternate Scenario

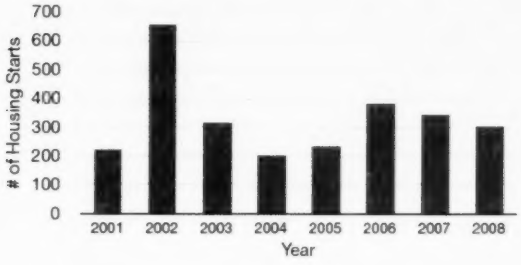
In the Alternate Scenario, Stony Plain's population growth is projected to be lower than in the Trend Scenario due to the concentration of residential development in communities with proximity to major employment areas in the Region.

Stony Plain's employment in the Alternate Scenario is less than the Trend Scenario due to reduced population and jobs being more likely to locate in the Acheson area, rather than in the Town.

Stony Plain Planning Documents Used to Guide Population / Employment Projections include:

- Land Use Districts Map (2007).
- Municipal Development Plan (2005 - 2020).

Housing Starts



Major Projects

Project Sector	Number of Projects	Project Cost ($)
Institutional	1	39,100,000
Infrastructure	1	6,000,000
Total	**2**	**$45,100,000**

Included in the major projects summarized above are the following:

- Replacement High School, $39.1 million. Under construction.
- West Trunk Sewage Line, $6 million. Completed.

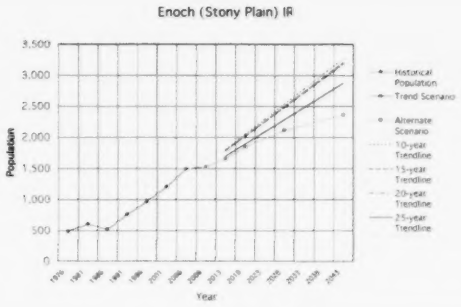
STONY PLAIN 135 "ENOCH" (INDIAN RESERVE)

Since 1986 Stony Plain 135 "Enoch" has grown steadily. Over the entire period beginning in 1976, Enoch has grown at an average annual rate of 3.9 percent, which is above the average for the Edmonton Region (2.6 percent).

Population

The population is projected to grow from 1,521 in 2008 to 2,355 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.3 percent over the projection period.

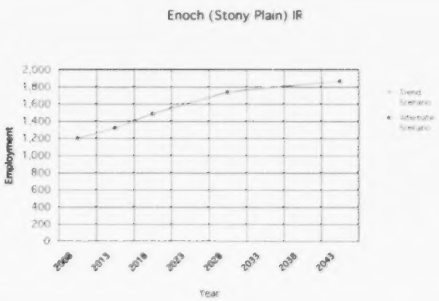
In the Alternate Scenario, the population is projected to grow from 1,521 in 2008 to 2,355 in 2043. This growth reflects an average annual change of 1.3 percent over the projection period.



Employment

Total employment is projected to grow from 1,198 in 2008 to 1,865 in 2043. This growth reflects an average annual change of 1.3 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 1,198 in 2008 to 1,865 in 2043. This growth reflects an average annual change of 1.3 percent over the projection period.



Trend / Alternate Scenario

Stony Plain 135 "Enoch" is projected to experience modest population and employment growth in each of the Trend and Alternate scenarios without significant impact from application of the Land Use Principles and Policies.

Planning Documents Used to Guide Population / Employment Projections

- No land use plans were acquired.

Housing Starts

- No housing starts data was available.

Major Projects

- There are no major projects identified.

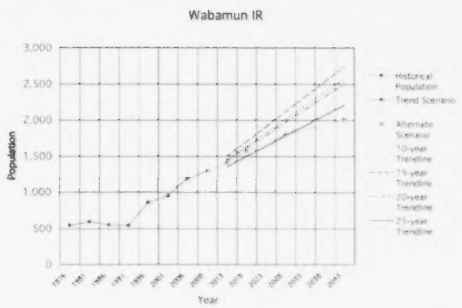
WABAMUN 133A/133B (INDIAN RESERVE)

Since 1991 Wabamun 133A/133B has grown steadily. From the beginning of 1976, Wabamun IR has grown at an average annual rate of 2.6 percent, which is equivalent to the average for the Edmonton Region (2.6 percent).

Population

Population is projected to grow from 1,300 in 2008 to 2,013 in 2043 in the Trend Scenario. This growth reflects an average annual change of 1.3 percent over the projection period.

In the Alternate Scenario, the population is projected to grow from 1,300 in 2008 to 2,013 in 2043. This growth reflects an average annual change of 1.3 percent over the projection period.



Employment

Total employment is projected to grow from 208 in 2008 to 317 in 2043. This growth reflects an average annual change of 1.2 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 208 in 2008 to 317 in 2043. This growth reflects an average annual change of 1.2 percent over the projection period.

Trend / Alternate Scenario

Wabamun 133A/133B is projected to experience modest population and employment growth in each of the Trend and Alternate scenarios.

Planning Documents Used to Guide Population / Employment Projections

- No land use plans were acquired.

Housing Starts

- No housing starts data was available.

Major Projects

- There are no major projects identified.

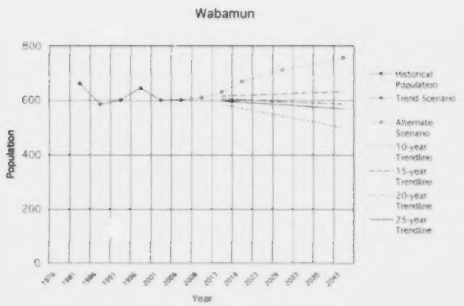
WABAMUN

Wabamun was incorporated as a Village in 1980. 1976 growth has been sporadic, averaging a net decline of 0.4 percent per year, which is below the average for the Edmonton Region.

Population

Wabamun's population is projected to grow from 610 in 2008 to 756 in 2043 in the Trend Scenario. This growth reflects an average annual change of 0.6 percent over the projection period.

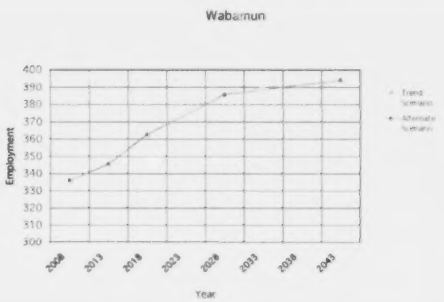
In the Alternate Scenario, the population is projected to grow from 610 in 2008 to 756 in 2043. This growth reflects an average annual change of 0.6 percent over the projection period.



Employment

Total employment is projected to grow from 336 in 2008 to 394 in 2043. This growth reflects an average annual change of 0.5 percent over the projection period.

In the Alternate Scenario, total employment is projected to grow from 336 in 2008 to 394 in 2043. This growth reflects an average annual change of 0.5 percent over the projection period.



Trend Scenario

Wabamun is projected to experience growth that is largely consistent with the historical trends. Employment growth is assumed to follow population growth.

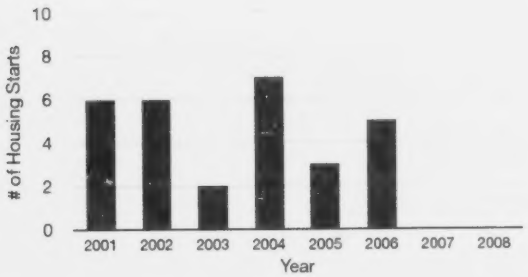
Alternate Scenario

The Alternate Scenario for Wabamun is assumed to be the same as in the Trend Scenario. The application of the Land Use Principles and Principles is not expected to have a substantive impact on growth in Wabamun.

Wabamun Planning Documents Used to Guide Population / Employment Projections include:

- No land use plans were provided by the municipality.

Housing Starts



Major Projects

- There are no major projects identified for the Village of Wabamun.

APPENDIX A: CITY OF EDMONTON TRAFFIC DISTRICTS